

An aerial photograph of London, England, featuring the River Thames and the iconic Tower Bridge. The city skyline is visible in the background under a dramatic, cloudy sky. The image is used as a background for a law training guide cover.

CENTRAL

# LAW TRAINING

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MADE PERFECT

**Corporate &  
Commercial Law**

*Your* CPD Training Guide  
January 2015 Onwards

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## An Introduction to IPOs **NEW**

**Hot  
Topic**

Intermediate | 3 hours CPD

This half-day course provides an overview of the IPO process. It will consider the process for admission of a company's shares to the main market of the London Stock Exchange or to AIM. It will provide an overview of the IPO process and the key parties involved.

It will deal with the following:

- The IPO process and timetable
- The parties involved and their roles
- Key documentation, including the prospectus and the underwriting agreement
- Key issues and factors to consider when planning an IPO

This half-day course is an essential overview for all those joining a corporate department whether as newly qualifieds or transferring from other departments within a firm. It will serve as a useful refresher and update for those more experienced lawyers who do not deal with IPOs on a regular basis. It will be particularly useful for in-house counsel who may be called upon to give guidance on basic IPO matters.

Speaker: **Martin Penn** is a corporate lawyer at DLA Piper in London. He advises on corporate finance transactions, including initial public offerings, secondary equity fundraisings, as well other transactions under the Listing Rules or AIM Rules. Martin also advises on public takeovers, corporate governance matters and securities regulations.

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London      18 Jun pm

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£160 + VAT CLT Members/£320 + VAT Non-members

## Company Law Update

**Best  
Seller**

Update | 6 hours CPD

This course provides you with a comprehensive and up-to-date exploration of the key provisions of the Companies Act 2006, as well as a review of other relevant elements of corporate ownership and management.

The course will assist legal practitioners and non-legal professionals alike, overseas lawyers starting work in England or Wales, those returning from a career break and anyone requiring a substantive review or update of company law.

Topics covered include:

- Company formation • Constitution • Shareholders' meetings and resolutions
- Directors: definitions, appointment and removal • Directors duties • Transactions
- Derivative actions and unfair prejudice • Other risks and liabilities • Execution of documents • Registration of charges • Maintenance of capital • Directors' interests in share capital • Disclosure and transparency • Takeovers • Insolvency and administration.

Speaker: **Ed Davies** is a freelance professional trainer, designing and delivering professional development and skills courses. He was formerly in private practice with Freshfields and Olswang.

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Leeds      2 Mar  
Bristol      3 Mar  
London      4 Mar

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## Directors: Duties, Responsibilities and Liabilities

**Hot  
Topic**

Intermediate | 6 hours CPD

In recent years, company directors have faced a significant number of changes to their status, duties and liabilities from a wide range of legislation; particularly the Companies Act 2006.

It is now possible to assess the practical impact of many of those changes and examine how directors should conduct themselves in order to comply.

This course provides a comprehensive examination of the different issues affecting directors and will benefit all company lawyers and their director clients.

Topics covered include:

- Appointment and removal
- Directors' duties
- Derivative claims
- Liability: ratification, indemnity and D&O insurance
- Directors' interests
- Substantial property transactions
- Loans to directors
- Company accounts and reports
- Service contracts and remuneration
- Insolvency considerations
- Corporate Manslaughter and Corporate Homicide Act 2007
- Health and safety responsibilities
- Corporate governance responsibilities

Speaker: **Ed Davies** is a freelance professional trainer, designing and delivering professional development and skills courses. He was formerly in private practice with Freshfields and Olswang.

**London**

**7 May**

£210 + VAT CLT Members/£450 + VAT Non-members

## Certificate in Company Law Practice **Best Seller**

Foundation | 6 hours CPD

This highly practical course will introduce you to the essential elements of company law.

Designed for both commercial practitioners seeking a greater understanding of the topic and those looking to refresh their knowledge with the latest position, it will particularly focus on the aspects involved within the following topics:

- Company law fundamentals - Companies Act 2006 - incorporation and limited liability - public companies vs. private companies - memorandum and articles of association - winding up and administration.
- Directors - appointment, removal and disqualification of directors - role of directors - board meetings - directors' duties.
- Shareholders - role of shareholders - shareholders' written resolutions - unfair prejudice - derivative actions.
- Shares - allotment of shares - statutory preemption right - classes of shares - capital maintenance.

Speaker: **Nigel Banerjee** teaches at King's College London and previously worked as a corporate professional support lawyer in the City.

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London	14 Apr, 17 Jun
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£210 + VAT CLT Members/£450 + VAT Non-members

## Small Business Sales: What the Textbooks Don't Tell You **Best Seller**

Intermediate | 6 hours CPD

This practical course looks at the wide range of issues which arise in small business sales from structuring the transaction and drafting the documents through to managing the client, tax and employment law.

It also looks at the mechanics of the transaction process, the potential pitfalls, the legal issues and offers some solutions for practitioners.

The course will include:

- Structuring the sale
- Drafting the documents
- Managing the client
- Warranties and disclosures
- VAT and stamp duty issues
- Employees and TUPE
- Dealing with leased assets
- Costing and deal management

Speaker: **Keith Lewington**, MA (Oxon), Solicitor, spent 25 years as a partner in a national law firm. He now practises as part of an innovative virtual law firm, Excello Law Ltd.

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Birmingham	7 May
London	21 May

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£210 + VAT CLT Members/£450 + VAT Non-members



## Understanding and Interpreting Company Accounts

**Best  
Seller**

Foundation | 6 hours CPD

**Introduction to accounting concepts** • Small and medium company thresholds, audit exemptions, where non-corporate entities fit • UK GAAP: the framework • IFRS: who it applies to and the framework • Examples of differences between UK GAAP and IFRS • The future of UK Financial Reporting: FRS 100,101 and 102 and the potential impacts.

**Contents of financial statements** • Profit and loss account • Balance sheet • Cash flow statements • Discussion of why profit does not always mean cash • Overview of other statements, notes etc.

**Group accounts** • Introduction to basic group accounting principles • Consolidation of overseas subsidiaries • How to account for an acquisition • What is goodwill and what do we do with it? • Associates and joint ventures • Merger accounting.

**Tricky and judgemental areas** • Fixed assets - depreciation and revaluation • Stock - costing and provisions • Bad debt provisions • Provisions and contingent liabilities • Leasing • Revenue recognition • Defined benefit schemes • Share based payment.

**Valuation and deal issues** • Common methods of valuing companies • Focus on EBITDA - what does it mean? • Enterprise value and cash-free/debt-free.

**Dividends and distributions** • Interaction of accounting and law • What are realised profits and losses? • Practical issues when declaring dividends.

Speaker: **Martin Howard** is Hazlewoods' Technical Partner and has spent much of his career working with corporate clients, providing advice in the areas of audit, corporate tax, management accounting and general business.

London 3 Feb, 2 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## Decision-making by Directors And Shareholders: How to Get it Right

Intermediate | 3 hours CPD

This course examines the ways in which private companies make decisions.

In relation to directors, it considers the relative merits of holding a board meeting and passing a directors' written resolution, and discusses the impact on the decision-making process of the statutory directors' duties.

In relation to shareholders, it looks at the formalities and underlying law relating to shareholders' written resolutions and general meetings, and discusses the unanimous consent rule.

Topics covered include the following:

- Directors
- Board meetings vs. directors' written resolutions
- Tips for drafting board minutes
- Complying with section 172, CA 2006
- Impact of sections 175 and 177, CA 2006 (conflicts duties) shareholders
- Shareholders' written resolutions - procedure and limitations
- Decisions by a sole member (section 357, CA 2006)
- General meetings
- Tips for drafting shareholder resolutions
- The unanimous consent rule (Duomatic principle)
- Corporate governance responsibilities

Speaker: **Nigel Banerjee** teaches at King's College London and previously worked as a corporate professional support lawyer in the City.

London 17 Apr pm

£140 + VAT CLT Members/£300 + VAT Non-members

## Company Constitutions - What You Need to Know

Intermediate | 3 hours CPD

This course provides you with the key features of a private company's constitution, with a particular focus on the relationship between the articles and the substantive provisions of the Companies Act 2006. It will cover:

- Contents of articles • Division of powers between shareholders and directors
- Drafting the directors' power to delegate in light of Smith vs. Butler (2012)
- Decisions by directors • Appointment of directors • Dealing with ss.175 and 177 CA 2006 (conflicts duties) • Controlling the share structure • Dividends • Potential pitfalls and how to avoid them • Altering the articles • Procedure and documentation • Limits on shareholders' freedom to amend • The legal nature of the constitution • Relationship between memorandum and articles • Sections 17 and 257 CA 2006 (definition of 'constitution') • Section 171(a) CA 2006 (director's duty to act in accordance with constitution) • Enforcement.

Speaker: **Nigel Banerjee** teaches at King's College London and previously worked as a corporate professional support lawyer in the City.

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London 17 Apr am

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£210 + VAT CLT Members/£450 + VAT Non-members

## Drafting Commercial Lasting Powers of Attorney **NEW**

Intermediate | 3 hours CPD

Company and Private Client Lawyers take heed! Legislative changes concerning company directors say; if they lack mental capacity they may not necessarily now be removed. This creates a quandary for a company, particularly their attitude to risk. Doing nothing could endanger the company; creating a Commercial LPA reduces the risk. Commercial LPA's can be used to manage decisions where a director is unavailable or away on business, just like an ordinary LPA or where they become incapacitated for longer periods of time or lack mental capacity.

This course will take solicitors through relevant company law; identifying business structures and drafting Commercial LPA's. Showing how different areas of law impact and how best to advise a company on making a Commercial LPA.

Topics covered:

- Personal & commercial LPA clashes
- Directors: problems and removals
- Taking instructions
- Checking & adjusting business structures
- Applying current case law
- Drafting a Commercial LPA

Speaker: **Craig Ward**, is a consultant solicitor and author. He has a degree in psychology and is a member of Solicitors For the Elderly and the British Psychological Society. He speaks internationally on elderly care law, mental capacity law, the Court of Protection and mediation. Craig mediates on commercial, probate and Court of Protection disputes and is the author of Who Cares (2012) Inspirational Press and Lasting Powers of Attorney: A Practical Guide (2nd Edition) (2011) The Law Society."

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Manchester 16 Jun pm  
Birmingham 17 Jun pm  
London 18 Jun pm

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£140 + VAT CLT Members/£300 + VAT Non-members

## Introduction to Due Diligence **NEW**

Foundation | 3 hours CPD

This half-day course is an essential introduction for all of those joining a corporate department or who will be called on to provide corporate support. It will also be particularly useful for in-house counsel who may be called on to give advice and guidance during the process of a company sale or purchase, including sensible steps to take to prepare for the due diligence process and best practice suggestions. During the course delegates will compile their own best practice checklist for due diligence and then test it in a small due diligence exercise.

This course is a useful continuation from “Essential Elements of a Private Acquisition” course.

It will deal with the following:

- Due Diligence Questionnaire (preparation and response)
- Data Rooms
- Preparation of a pro-forma checklist for use when conducting due diligence
- Due Diligence exercise/evaluation of common issues
- Disclosure letter

Speaker: **Jackie Sheldon** is a freelance senior lecturer specialising in designing, writing and delivering courses on company law. Jackie qualified as a corporate solicitor in the City at Taylor Wessing before moving to the North West and working at Pannone LLP and Hammonds. Jackie has been teaching for over 9 years, is a Fellow of the Higher Education Academy and has a Post Graduate Certificate in Professional Education. Jackie is currently delivering modules on the Legal Practice Course/Graduate Diploma in Law at BPP University.

London	16 Jun pm
Manchester	25 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

## Essential Elements of Private Company Acquisition

Intermediate | 3 hours CPD

This half-day course provides an overview of a private company acquisition. It will consider the key elements of a transaction from initial instructions up to and including completion. It is an essential overview for all those joining a corporate department and will be particularly useful for in-house counsel who may be called upon to give advice and guidance during the process of a company sale or purchase.

It will deal with the following:

- Key elements involved in a private treaty sale
- Differences between a share sale and asset sale
- Share purchase agreement – clauses and negotiation points including:
  - Warranties
  - Indemnities
  - Seller protection clauses
- Additional considerations for an asset purchase agreement
- An overview of the due diligence and disclosure process [See Introduction to Due Diligence and Disclosure for a more detailed understanding]
- Factors to consider at completion

Speaker: **Jackie Sheldon** is a freelance senior lecturer specialising in designing, writing and delivering courses on company law. Jackie qualified as a corporate solicitor in the City at Taylor Wessing before moving to the North West and working at Pannone LLP and Hammonds. Jackie has been teaching for over 9 years, is a Fellow of the Higher Education Academy and has a Post Graduate Certificate in Professional Education. Jackie is currently delivering modules on the Legal Practice Course/Graduate Diploma in Law at BPP University.

London	16 Jun pm
Manchester	25 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

## A Piece of the Pie - An Introduction to Employee Share Schemes

Foundation | 3 hours CPD

Offering share-based incentives can be crucial to successfully recruit and retain the best executives and employees. This course provides the ideal introduction to what can be a complex area of law, covering the important structural and tax issues on implementation, as well as including some practical tax planning points at the time of a takeover or trade sale.

It will include:

- An overview of all HMRC approved share plans including available tax reliefs
- A detailed explanation of enterprise management incentive option arrangements
- Headline valuation issues to consider
- An introduction to employee benefit trusts and the disguised remuneration rules
- A summary of the restricted securities regime and its tax implications
- The impact of a company sale on employee share options and awards

It will be of interest to tax, corporate and employment lawyers, in-house counsel, HR professionals and finance directors.

Speaker: **Mark Gearing** is a partner at Field Fisher Waterhouse. He advises employers and employees on the design, implementation and operation of employee share plans and provides incentives support in relation to corporate transactions. He is a member of the Share Plan Lawyers Group and sits on HMRC's Employment Related Securities and Valuations Sub-group.

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London 19 May am

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£140 + VAT CLT Members/£300 + VAT Non-members

## An Introduction to Corporate Governance

Foundation | 6 hours CPD

The course will be of benefit to all corporate lawyers, corporate governance professionals and company secretaries, as well as to company directors themselves.

This full-day course provides an introduction to the key aspects of corporate governance in the UK and the concepts on which it is based, with particular reference to the major codes and other regimes applicable in different circumstances, as well as those applying to investors. The course considers the development of corporate governance (drawing on some personal reminiscences of the speaker), the legal structures on which governance is based and the "voluntary" nature of different UK codes; and it examines some of the practical implications of current corporate governance reporting regimes.

It will include :

- An introduction to the world of corporate governance, and the UK's place in it
- The purpose and value of good governance • Unlisted companies • Issues when considering "listing" or "quotation" • FRC Guidance documents • The "comply or explain" regime of the UK Corporate Governance Code • The "corporate governance statement" • Relations with shareholders • The UK Stewardship Code • "Comply or explain" under the UK Stewardship Code • Future developments: the EU?

Speaker: **Mark Cardale** is a corporate lawyer and worked for many years with Slaughter and May. He acquired an interest in corporate governance while head of the firm's then New York office during the era of Enron and other corporate accounting scandals in the US.

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London 7 May

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£210 + VAT CLT Members/£450 + VAT Non-members

**Hot  
Topic**

## Corporate Support in a Day

Intermediate | 6 hours CPD

When asked to assist with the property aspects of corporate transactions, property lawyers need to be prepared and ready for the task. This often means working in a very different way and adopting a totally different approach.

This five hour practical course aims to provide both an overview and understanding of what the job might entail and will include:

- How corporate lawyers work - understanding how this differs from what property lawyers are used to
- An overview of corporate support and explanation of how the various elements fit together
- The differences between a share purchase and an asset purchase and the practical implications for the property lawyer
- Separation of 'Property' from other 'Assets' and other issues
- The practical exercise of negotiating warranties and disclosures and undertaking due diligence
- The CLLS Certificate of Title - an overview and understanding of how to complete it

Practical scenarios will be used throughout the day to highlight various issues.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

London 19 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

## Project Management for Transactional Lawyers

Intermediate | 6 hours CPD

Running a transaction requires operational efficiency based on first class organisational skills. Clients appreciate a lawyer who runs their matter smoothly and effectively. Quality project management ensures that you achieve the right outcome for your client with maximum efficacy.

This course will demonstrate the benefits of running a project successfully. It will enable delegates to acquire tips, techniques and tools for use in seeing a matter through with procedural smoothness from instructions to final bill.

Participants will use a current matter of their own (no files needed) as an action learning case study throughout the course.

Course content:

- The nature of a project • Benefits of project management • The stages and phases of a project • Client instructions and scoping • Setting parameters
- Planning the project • Work breakdown and task analysis • Resource allocation
- Setting timelines • Using GANTT charts to control task activity and work flow
- Monitoring the process • Stakeholder management • Risk assessment and safety nets • Final review and signing off • Feedback session.

Speaker: **Martin Richardson** is a lawyer who began his career as a legal academic before moving to the City and the former Berwin Leighton to set up and run the firm's first professional development programme.

London 17 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

## Drafting a Shareholder Agreement

Intermediate | 6 hours CPD

The Companies Act 2006, which introduced a company constitution and new model articles of association, has had a radical effect on traditional shareholder agreements.

This course looks at the content, form and style of shareholders' agreements against the background of the company's constitution with particular reference to 'quasi-partnership' companies.

Topics include:

- Shareholders' agreements - when and why?
- The company's constitution
- 'Standard' changes to the model articles
- The governance framework
- Matter requiring consent
- Share transfer provisions
- What is a 'good'/'bad' leaver?
- Restrictive covenants

Speaker: **Keith Lewington**, MA (Oxon), Solicitor, spent 25 years as a partner in a national law firm. He now practises as part of an innovative virtual law firm, Excello Law Ltd.

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**Birmingham** 19 Mar  
**London** 25 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

## Essential Toolkit for In-house Counsel

Intermediate | 12 hours CPD

This two day course is aimed at solicitors moving in-house for the first time and will also provide a useful refresher for those returning from a career break. It gives an overview and update of the areas of law in which your advice will most commonly be sought. The course also provides invaluable advice on integrating the legal team into a business and "selling" its value to your internal client. The course is not intended to deal with commercial contracts and solicitors who do not have a background in commercial contracts may also wish to attend the 2 day Certificate in Commercial Contract Drafting.

**Day 1** • Company Secretarial - the fundamentals • Intellectual Property - understanding, protecting and enforcing - inventions and patents - trade marks and passing off - copyright and database rights - design rights - confidential information • Data Protection - key principles - auditing the business • TUPE - when does it apply? - what rights does it create?

**Day 2** • Competition law - what can and can't you do? - vertical block exemption - Implementing a competition compliance programme - preparing for a dawn raid • UK Bribery Act overview and a practical guide to achieving compliance in your organisation • Selecting and managing professional advisers • Information technology to help the in-house lawyer • Client care and selling the value of an in-house team.

Speaker: **Iain Larkins**, founded Radius Law in September 2013 to provide commercial legal services. Prior to that, Iain was an in-house lawyer for 14 years; he was General Counsel and Chief Compliance officer for the Mercedes-Benz UK Group from 2006-2013 in which role he led a team of 18 staff, implemented large scale compliance programmes and also managed regulatory investigations.

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**London** 10-11 Mar

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### Tax in M&A and Business Sales: What You Need to Know

Intermediate | 3 hours CPD

This course examines the tax issues at the heart of day-to-day corporate activity. It will be invaluable for corporate lawyers whose firm does not have in-house tax expertise also for in-house lawyers and managers.

It explains:

- Why tax is a key consideration for both sellers and buyers in mergers and acquisitions or business sales
- How it can be the determining factor in choosing between a share and asset sale
- How to structure the transaction
- Share sales
- Employee share plans and incentive arrangements
- Hive-outs and other restructuring as part of an M&A transaction
- Contractual protection for tax

Speaker: **Andrew Prowse** is a corporate tax partner at Field Fisher Waterhouse LLP. He is a solicitor and chartered tax adviser who has experience of the full gamut of corporate tax, with a particular emphasis on M&A transactions, joint ventures, company reorganisations and venture capital investment. Andrew developed FFW's popular tax blog ([taxdeductionsblog.ffw.com](http://taxdeductionsblog.ffw.com)), which launched in 2012.

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London      16 Apr am

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£140 + VAT CLT Members/£300 + VAT Non-members

### Hot Topic

### Negotiating Tax Warranties and Tax Covenants in M&A Transactions **NEW**

Intermediate | 3 hours CPD

This practical and user-friendly course will explain how to negotiate tax warranties and tax covenants in M&A transactions.

It will be invaluable to in-house lawyers or corporate lawyers dealing with tax provisions in share purchase agreements whose firm does not have in-house tax expertise.

You will learn about:

- The reasons for each provision in a standard tax covenant and set of tax warranties
- The key issues from the Seller's and Buyer's perspectives - who wants what and why?
- The traps for the unwary and the danger of accepting model forms
- What to focus on if you need to get to a reasonable position quickly and effectively
- What tax issues to look out for elsewhere in the share purchase agreement

Speaker: **Andrew Prowse** is a corporate tax partner at Field Fisher Waterhouse LLP. He is a solicitor and chartered tax adviser who has experience of the full gamut of corporate tax, with a particular emphasis on M&A transactions, joint ventures, company reorganisations and venture capital investment. Andrew developed FFW's popular tax blog ([taxdeductionsblog.ffw.com](http://taxdeductionsblog.ffw.com)), which launched in 2012.

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London      14 May am

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£140 + VAT CLT Members/£300 + VAT Non-members



## The EU Public Procurement Regime - **Best Seller**

Intermediate | 6 hours CPD

The EU procurement regime is changing all the time. This course offers an overview of the key developments in the last 12 months, including UK government legislation and guidance from the EU Commission.

During 2013 it is expected that the new framework of directives will be enacted and these will shape public procurement for the next decade.

This course will deal with the up-to-date position and with any lessons to be learned from the councils compromise text (draft) for those new directives.

This course includes:

- Changes in the light of the *Presstext* case (C-454/06) • Is *Jean Auroux* (Case C-220/05) still relevant? • Cases relating to PPPs/JVCs • Shared services agenda and commission guidance on pooled funding and joint procurement • In-house companies - developments since *Teckal* case (Case C-107/98) • Challenge and remedies confidentiality and disclosure.

Speaker: **John Bennett** is a consultant for Eversheds LLP, within the public sector team and has advised on public sector tendering and EU procurement issues for over 20 years. Through Eversheds he has advised over half of the local authorities in England. Alongside his legal work as a practitioner, he helped set up a new law degree at York University and was until 2014 the Programme Leader for the LLM in International Corporate and Commercial Law at York Law School.

London 28 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

## Tendering: An Introduction to the Legal Aspects **Hot Topic**

Intermediate | 6 hours CPD

Tendering exercises between entirely private sector organisations are largely regulated by common law contractual principles. Tendering by the public sector is more heavily regulated, principally by the European Public Procurement Regime.

This course provides an explanation of how and why the public sector is legally regulated in the way it conducts its tendering exercises. It is therefore designed for those that either have clients in the public sector or whose clients are tendering to the public sector.

It explains the legal framework provided by the EU regime and offers a 'walk through' of the procurement process before outlining some of the more complex areas, such as using frameworks and mutualisation.

Speaker: **John Bennett** is a consultant for Eversheds LLP, within the public sector team and has advised on public sector tendering and EU procurement issues for over 20 years. Through Eversheds he has advised over half of the local authorities in England. Alongside his legal work as a practitioner, he helped set up a new law degree at York University and was until 2014 the Programme Leader for the LLM in International Corporate and Commercial Law at York Law School. John has been involved in developing and delivering government policy and has provided procurement training for the EC Commission and the Court of Justice. He was the primary adviser both on the first ever PFI project in local government and the first contract for the London Olympic games. He is co-author of many of the leading encyclopaedias on local authority contracting and procurement including EU Procurement: Law and Practice (with Lee Digings) and is a former contributing editor for The Encyclopaedia of Local Government Law. England.

London 10 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

# Contract and Commercial Law Update 2015

Intermediate | 6 hours CPD

This popular, lively and practically based course is a one-stop guide to the most significant recent contract cases over the last 12 months. It has been extended to include key elements of new legislation and EU developments which affect the commercial practitioner. With an emphasis on B2B contracts, the cases are related back to contracting strategies for both purchasers and sellers.

Topics covered include:

- Call for tender: EU procurement changes ahead • Formation and execution traps after *Pro-Duct* (Fife) • Signatures, E-Signatures Regulation and *Salgocar* • Letters to proceed and side letters after *Eurocom* • Witnesses and independent guarantee advice after *Padden* • Capacity and the corporate veil after *Redcard* • Pricing, payment and interest: new EU Payment Terms legislation • Title, obligations, representations and warranties after *Sycamore Bidco vs. Breslin* • Endeavours after *Blackpool Airport* • Material breach, termination and affirmation problems after *Leofilis* • Misrepresentation and good faith after *Daventry* • Caps, liability and loss • Boilerplates - entire agreement after *Axa Sun Life* • Force majeure • Applicable law and jurisdiction: EU Jurisdiction Regulation • Data Protection: Data Protection Regulation 2013 • Competition developments.

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

Best  
Seller

# Practical Competition Law: An Update on Competition Law for Commercial Lawyers **NEW**

Foundation | 3 hours CPD

This course provides a practical update and gives key guidance on competition issues to look out for in commercial contracts and business transactions.

The course will cover:

- Why worry about competition law at all?
- Dealers, distributors and competition law: dos and (some) don'ts
- What your clients can do with competitors (joint ventures, trade associations) and what they can't (cartels)
- What to do if you think your client may be dominant... and if your client is the victim of anti-competitive behaviour
- Update on topical developments

Speakers: **David George**, is a specialist in competition law with significant experience of contentious antitrust matters, including investigations by competition authorities and standalone private litigation in the English High Court. He also advises on the competition law aspects of commercial arrangements and on internal compliance programmes and **Osman Zafar** is a senior associate specialising in competition law, with a keen interest in the TMT sector. He has contentious and non-contentious experience, including work on international cartel investigations, advising on issues arising from standardised technologies, delivering compliance training, and merger control in the music, financial services, energy, consumer products and educational publishing sectors. Osman contributes regularly to the Computer Law and Security Review. He has recently taught competition law on the IP interface at the LSE, a subject which he also blogs about on Bristows' blog, 'The CLIP Board'.

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Manchester	6 Feb
London	13 Feb, 26 Jun
Birmingham	20 Feb

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London	24 Mar pm
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£210 + VAT CLT Members/£450 + VAT Non-members

£140 + VAT CLT Members/£300 + VAT Non-members

## Executing Documents: How to Get it Right First Time **NEW**

Foundation | 3 hours CPD

The deal is done and completion documents are ready, but you are not home and dry. It is surprising how often last minute hitches and queries arise and you need to be equipped to advise your client with confidence. This course provides a comprehensive guide for all commercial practitioners on the signing and execution of documents. It reviews recent guidance and cases and explains some of the more challenging situations that you will have to deal with in practice.

Topics covered include:

- Can one director sign for several entities?
- Electronic signatures
- Counterparts
- Execution blocks (deeds and under hand)
- Power of attorney
- Land Registry guidance
- Completion meetings (other than in person) and Law Society guidance on virtual signing
- Amending documents pre and post execution
- The *Mercury* case
- Rule in *Pigot's* case and *Raiffeisen Zentralbank Osterreich AG*
- *Williams & Others vs. Redcard Ltd & Others; Garguilo and Ors*
- Warranties for authority
- Dealing with absence of authority

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

London 21 Oct pm

£140 + VAT CLT Members/£300 + VAT Non-members

## Contractual Disputes: The Complete Picture

Intermediate | 6 hours CPD

This is a highly practical course which focuses on the opportunities and risks occurring in every day commercial contracts which underpin most civil disputes, making it a must for private practitioners and in-house lawyers whether negotiating, drafting or litigating on contract and commercial matters.

Topics covered include:

- The legal risks audit • Avoid litigation - essential protective terms • Incorporation of terms and life after the 'battle of the forms' • Avoiding challenges to the enforceability of settlements • Entire Agreement clauses, pushing them to the limit • Compromise Agreements: 3 simple rules • Damages update, recent developments and calculation issues • Liquidated damages and penalty clauses revisited, the use of a condition precedent • Making time of the essence, the danger of the *Union Eagle* case • Post termination restrictive covenants • Language and punctuation • Exclusions and limitations • Contractual intent and enforceability including the danger of commencing work prior to 'signing off' • Discharge and terminating the contract and the exposure of wrongful termination • Dispute resolution provisions and ADR clauses • Traps for the unwary • The solicitors' 'must know' list of contract and commercial law principles.

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

London 27 Feb, 5 Mar  
Manchester 13 Mar  
Birmingham 12 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

# Limiting Liability - Indemnities, Warranties and Guarantees That Work **Best Seller**

Advanced | 6 hours CPD

This course is aimed at experienced practitioners who negotiate and draft commercial contracts in private practice and in-house and may also be of interest to litigators. It undertakes an in-depth review of the problem areas around the limitation of liability in commercial contracts. It will also identify common obstacles in negotiations and suggest ways in which these can be navigated.

Topics covered include:

- Limitation of liability: caps, what is reasonable? Deliberate breach scenarios; relationship with entire agreement, warranties and indemnities
- Indemnities: providing and resisting, scope and 'trigger' mechanisms, support or replace the obligation, enforcement
- Warranties: what can be covered? How to tailor to specific use; services warranties, title, IPR and quality, flow-down and chain issues
- Financial and performance guarantees: form and structure, primary and secondary issues, using bonds and escrow, the impact of change control, e-signatures and pre-emptive defences and enforcement

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

London	20 Mar
Leeds	27 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

# Contract and Commercial Law Update 2015

Update | 6 hours CPD

This popular, lively and practically based course is a one-stop guide to the most significant recent contract cases over the last 12 months. It has been extended to include key elements of new legislation and EU developments which affect the commercial practitioner. With an emphasis on B2B contracts, the cases are related back to contracting strategies for both purchasers and sellers.

- Call for tender: EU procurement changes ahead • Formation and execution traps after Pro-Duct (Fife) • Signatures, E-Signatures Regulation and Salgocar • Letters to proceed and side letters after Eurocom • Witnesses and independent guarantee advice after Padden • Capacity and the corporate veil after Redcard • Pricing, payment and interest: new EU Payment Terms legislation • Title, obligations, representations and warranties after Sycamore Bidco v Breslin • Endeavours after Blackpool Airport • Material breach, termination and affirmation problems after Leofilis • Misrepresentation and good faith after Daventry • Caps, liability and loss • Boilerplates- entire agreement after Axa Sun Life • Force majeure • Applicable law and jurisdiction: EU Jurisdiction Regulation • Data Protection: Data Protection Regulation 2013 • Competition developments.

The course includes a commentary on relevant cases and in the new guide to BFAs Code of Ethics.

Speaker: **Helen Swaffield**, is a barrister with 20 years' experience in commercial litigation. Within her practice at St Ives Chambers, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

Manchester	6 Feb
London	13 Feb, 26 Jun
Birmingham	20 Feb

£210 + VAT CLT Members/£450 + VAT Non-members

## Cloud Contracts - The Practical Guide to Drafting and Negotiating Hot Topic

Intermediate | 3 hours CPD

Cloud computing dominates technology talk. This course is aimed at those advising cloud suppliers and their customers. It will provide you with a practical guide on how to draft cloud contracts and will cover the following:

- How can you keep data secure and comply with data protection legislation?
- What measures should you include in a cloud contract to ensure the service is reliable so that the customer's business doesn't fail?
- What approach should you take to a supplier's liability?
- What issues should customers and suppliers consider at the end of a contract?
- How to adopt the Cloud Industry Forum's best practice recommendations
- How to decipher cloud industry jargon
- Tips for negotiating cloud contracts

This course will be of benefit as a refresher to experienced practitioners and will provide useful guidance to those relatively new to cloud contracts.

Speaker: **Frank Jennings** is a partner and head of the commercial team at DMH Stallard LLP. He specialises in technology law, intellectual property rights and commercial contracts. Frank qualified in-house with a computer games subsidiary of Sony.

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London      22 Apr am

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£140 + VAT CLT Members/£300 + VAT Non-members

## Drafting Commercial Contracts Best Seller

Intermediate | 6 hours CPD

Developed for the commercial lawyer, this course will refresh and update you on the key points of contract law and places them in a highly practical context.

Topics covered include:

- Formation
- Capacity and privity
- Express and implied terms
- Conditions precedent (including best endeavours)
- Time of the essence
- Warranties and indemnities
- Exclusion and limitation
- Force majeure
- Misrepresentation
- Entire agreement clauses
- Execution of deeds and documents post-October 2009
- Discharge of contracts
- Contractual and equitable remedies

Speaker: **Ed Davies** is a freelance professional trainer, designing and delivering professional development and skills courses. He was formerly in private practice with Freshfields and Olswang.

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Bristol      5 May  
London      6 May

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£210 + VAT CLT Members/£450 + VAT Non-members

# Certificate in Commercial Contract Drafting

Foundation | 12 hours CPD

This two-day course is aimed at solicitors with little or no experience of drafting commercial contracts. It will be of particular interest to in-house lawyers and will also be a useful refresher to those returning from a career break. It equips you with the essential knowledge and skills that you need to negotiate and draft a commercial agreement. It will look at frame agreements, standard terms, purchase orders and web contracting.

Day 1 - Key legal concepts underpinning commercial contracts and how to draft a contract:

- Parties, price, scope and duration
- Setting up different types of agreements
- Using a frame agreement
- Warranties, indemnities, guarantees
- Risk management
- IPR, licences, background and foreground
- Termination and liability and waiver
- Boiler plate provisions (inc. force majeure, entire agreement and jurisdiction)
- Restricting competition

Day 2 - Learning negotiation skills and application of knowledge in case studies:

- Services contracts under a frame agreement
- Goods contracts and sub-contracts
- How to negotiate: - Understanding the leverage - Styles/tactics - Track change issues - Authority and capacity.

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

Leeds London	2 - 3 Mar 16 - 17 Apr
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£495 + VAT CLT Members/£795 + VAT Non-members

**Best  
Seller**

# Drafting Around Tricky Commercial Contract Problems 2014 **NEW**

Intermediate | 6 hours CPD

This drafting course is aimed at solicitors in private practice and in-house. It reviews and discusses precedent clauses and identifies their advantages and pitfalls in everyday use. It is relevant in a number of different contractual contexts from purchaser to supplier and bespoke contracts to standard terms and conditions. It will also update you on relevant case law.

Topics covered include:

- Selecting the right structure - frame agreements, the website and deeds
- Authorisation and acceptance criteria
- Supplier obligations - how to boost performance: scope, warranties, performance guarantees and time
- Quality markers - rejection, KPIs and SLAs
- Limiting liability for performance (contractual and non-contractual)
- Breach and termination
- Financial remedies within the contract - liquidated damages
- Compliance - data protection, bribery and TUPE
- Boilerplate traps

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

Manchester London	8 May 15 May
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£210 + VAT CLT Members/£450 + VAT Non-members

## Converting Your Practice to Employment Law

Foundation | 6 hours CPD

This course provides fee earners who currently practise in other areas of law with a cross-over day into employment law and practice. It is geared to lawyers who want to build up their knowledge in this area. The course assumes no prior knowledge of employment law but is reasonably fast paced to cover the most common elements of practice.

Topics to be covered include:

- Terminating the employment relationship - wrongful dismissal - constructive dismissal - tribunal practice and procedure - drafting ET1 and ET3 - the law of compromise - negotiating settlements - drafting compromise agreements.
- Claims in unfair dismissal and redundancy - bringing and defending a claim - the threshold criteria - defences - the ACAS Code of Practice - disciplinary procedures - compensation - individual rights on redundancy - duties to consult - compensation.
- Discrimination - direct discrimination - harassment - indirect discrimination - age and disability discrimination - reasonable adjustments - recent statutory developments, the Equality Act, new policies and procedures.
- TUPE 2006 - identifying a business transfer in disposals and acquisitions of business - the implications of the application of TUPE - the rights of employees dismissed before or after a business transfer to which TUPE applies - bringing and defending a claim.

Speaker: **Lorna Valcin** is a legal consultant for Compromise Agreements Limited and a regular lecturer for CLT. She was rated as a 'notable practitioner' in *Chambers* and described as 'easy to get hold of and has a methodical approach to work'.

<b>Birmingham</b>	<b>5 May</b>
<b>Manchester</b>	<b>12 May</b>
<b>London</b>	<b>20 May, 29 Jan 16</b>
<b>Leeds</b>	<b>27 May</b>

£210 + VAT CLT Members/£450 + VAT Non-members

## Central Law Training Webinars

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**Visit: [www.clt.co.uk/webinars](http://www.clt.co.uk/webinars)**

Webinar/s	Members	Non Members
<b>1</b>	<b>£85</b>	<b>£170</b>
<b>4</b>	<b>£225</b>	<b>£450</b>
<b>10</b>	<b>£375</b>	<b>£750</b>
<b>20</b>	<b>£599</b>	<b>£1199</b>

*Terms and Conditions apply. All prices exclude VAT*

## Introduction to Sharia and Islamic Finance **NEW**

Foundation | 6 hours CPD

Islamic finance is one of the fastest growth areas in the world of finance, with annual growth estimated at between 15-20%.

This is an introductory level course for solicitors and accountants who are new to the world of Islamic finance and Sharia law.

It explains the basic Islamic economic concepts as well as the key sources and principles of Sharia law.

Topics covered include:

- Introduction and overview
- The Islamic economic system: key concepts
- Sharia law: key sources
- Key principles governing Sharia compliant transactions
- Islamic law of contract
- Sharia compliant modes of finance
- Sharia compliant investments
- 'Islamic insurance' - *Takaful*

Speaker: **Faizal Karbani** is a chartered accountant who has been working in the Islamic Finance industry since 2005, specialising in providing Sharia compliant independent financial advice. He has also worked with leading global Sharia consultancy firm Dar Al Istithmar and for Qatar Islamic Bank (UK). Faizal is an approved trainer for the Islamic finance qualification. He has worked with the UK Al Qalam panel of scholars, the UK government on tax legislation changes related to Islamic finance and is a member of the Islamic Finance Experts Group formed by the Muslim Council of Britain.

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London      19 May

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£300 + VAT CLT Members/£495 + VAT Non-members

## Debt Finance : Drafting the Debenture

Intermediate | 3 hours CPD

A practical and interactive session exploring the key clauses and points of negotiation between the borrower and the lead arranger in relation to a standard security debenture.

The course will benefit all legal practitioners working in a debt finance capacity, especially trainees and junior assistants, lateral and overseas hires from a nonbanking background, and anyone else wishing to refresh their understanding of these important documents. The course will cover:

- Security under English law
- Which security for which asset?
- Quasi security and guarantees
- Perfection and priority
- Drafting the debenture
  - Charging clause
  - Floating charge
  - Negative pledge and other covenants
  - Representations and warranties
  - Enforcement
- Recent developments

Speaker: **Ed Davies** is a legal learning and development professional who has designed, written and delivered courses for the leading law schools, commercial know-how providers and independently. He was formerly in private practice with Freshfields and Olswang.

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London      5 Mar pm

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£140 + VAT CLT Members/£300 + VAT Non-members



## Debt Finance: Drafting the Loan Agreement

Intermediate | 3 hours CPD

This practical course focuses on standard syndicated loan agreements and will benefit all legal practitioners working in a debt finance capacity.

It will be of particular interest to junior lawyers in private practice, but also to more senior practitioners with a non-banking background, including in-house counsel.

The course will cover:

- Types of loan product
- Overview of syndication process
- Terminology and key roles
- Negotiating the loan agreement
  - Key mechanics
  - Interest, costs and fees
  - Conditions precedent
  - Representations and warranties
  - Financial covenants
  - Default, enforcement and remedies
  - Transfers
- Recent developments

Speaker: **Ed Davies** is a legal learning and development professional who has designed, written and delivered courses for the leading law schools, commercial know-how providers and independently. He was formerly in private practice with Freshfields and Olswang.

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**London**      **5 Mar am**

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£140 + VAT CLT Members/£300 + VAT Non-members

## Bond Finance: The Fundamentals

Foundation | 6 hours CPD

Bond finance has never been cheaper. This course is designed to give you a fundamental working knowledge of bonds and fixed income securities and will be valuable for all lawyers working with banking or corporate clients in debt finance. The course looks at the range of products along with the roles and motivations of issuers, investors and intermediaries. It includes a section on the bond issuing process from origination through to secondary market trading. All the jargon and terminology is fully explained. The course will examine:

- Bond basics - definition and key features - what is a bond? - domestic and international markets - roles of the issuer, investor and intermediary
- Money markets instruments - definition and key features of LIBOR vs. base rate - T.Bills, CD's, acceptances, CP, money market funds
- Bond structures - typical bond structures - fixed and floating rate bonds - derivatives - interest rate swaps (IRS) - structured securities, zeros, hybrids and convertibles
- The price/yield relationship
- Credit ratings and the ratings agencies
- Macroeconomics and yield curves
- Issuing bonds - the primary market

Speaker: **Derek Taylor** has had a long career in finance/treasury in London and New York. He is an associate of the Institute of Bankers, a member of the ACI, the Financial Markets Association (Forex) and a member of the Society of Technical Analysts.

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**London**      **9 Jun**

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£300 + VAT CLT Members/£495 + VAT Non-members

# Insolvency and Asset Sales and 'Pre-Pack' Sale and Purchase Agreements

Intermediate | 6 hours CPD

This course provides a comprehensive guide to transactions involving troubled companies, including sale and purchase agreements and the particular issues which arise.

Topics covered include:

- The run up to insolvency and turnaround
- Administration: a challenge and an opportunity
- Sale agreements information and due diligence
  - Confidentially
  - Exclusivity
  - Areas outside control
  - Ransom payments
- The pre-pack sale
  - SIP16
  - The pre-pack in practice
  - *Hellas ii*

Speaker: **Philip Coates** is a former partner at Pinsents who now practises as a consultant. He specialises in insolvency law and practice and has practical experience of many turnarounds and restructuring for companies.

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London 22 Oct

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£210 + VAT CLT Members/£450 + VAT Non-members

# Certificate in Insolvency Law

**Best  
Seller**

Foundation | 6 hours CPD

This course is primarily aimed at practitioners in other fields who come across insolvent situations in their practice and wish to develop their knowledge and experience.

It will include:

- An introduction to the different insolvency regimes
- Using insolvency as a litigation recovery tool
- Pre-pack administrations
- Litigating for and against insolvency practitioners
- Piercing the corporate veil; getting at the directors personally
- Getting the most out of the insolvency practitioner
- Funding insolvency litigation

Speaker: **Stephen Allinson** is Chair of the Joint Insolvency Examination Board. He is a consultant with Lester Aldridge Solicitors as well as lecturing and presenting. He has for many years been recognised as a 'leader in his field' by legal directories. He regularly contributes to professional publications and has written a leading text on debt recovery.

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London 8 Oct, 3 Dec

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£210 + VAT CLT Members/£450 + VAT Non-members

## 10 Tricky Points in Insurance Law

Intermediate | 6 hours CPD

This course reviews the most common difficult issues in insurance law, including:

1. When are insurers entitled to avoid insurance?
2. How far is there a continuing duty of good faith?
3. What if insurers are in breach of their duty of good faith?
4. Construing warranties and the effect of breach
5. Construing conditions precedent and the effect of non-compliance
6. When can insurers be said to have waived their rights?
7. When can insurers be estopped from relying on their strict rights?
8. Differences between insuring on joint and composite basis
9. Differences between insuring on a claims made and losses occurring basis
10. Raising fraud in insurance claims

This course will include a practical case study which will involve some of the issues considered above.

Speaker: **Alison Green** is a barrister at 2 Temple Gardens. Alison specialises in insurance and reinsurance law. She is Vice President of the British Insurance Law Association and on the advisory panel to the Law Commission in relation to its review of insurance contract law.

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London 17 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

## Insurance Law: A Practical Introduction

Foundation | 6 hours CPD

This course, which includes a practical case study, provides a useful introduction to the key principles of insurance law including:

1. Key concepts in insurance, such as good faith and indemnity
2. Formation of the standard insurance contract, considering proposal forms and policies
3. Formation of the insurance contract in the London insurance and reinsurance market, considering traditional documentation and documentation following market reform
4. How Lloyd's work
5. Construing insurance policies
6. Effect of important insurance terms, such as warranties and conditions
7. Insurers' entitlement to avoid insurance for material non-disclosure and misrepresentation
8. Resolution of disputes through the Financial Ombudsman Service, the courts or alternative dispute resolution, such as mediation

This course will include a practical case study which will deal with problems which frequently arise in insurance disputes.

Speaker: **Alison Green** is a barrister at 2 Temple Gardens. Alison specialises in insurance and reinsurance law. She is Vice President of the British Insurance Law Association and on the advisory panel to the Law Commission in relation to its review of insurance contract law.

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London 5 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

# Consumer Law Update 2015

Hot  
Topic

Update | 6 hours CPD

This is a time of considerable change and development in consumer law. The implementation of the Consumer Rights Directive heralds changes for all those providing goods and services, whether the contract is made on or off premises or at a distance. The demise of the Office of Fair Trading has also led to changes in the regulation of many activities. It is vital that practitioners advising retailers and manufacturers are up to date to avoid civil law, criminal law and regulatory problems and this course will explain the changes and other developments in consumer law.

Topics covered include:

- Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013
- Payment Surcharges Regulations
- Abolition of OFT
- Consumer Protection from Unfair Trading Regulations 2008
- Business Protection from Misleading Marketing Regulations 2008
- Undertakings and enforcement orders under the Enterprise Act 2002

Speaker: **Deborah Parry** is a freelance consumer law author and lecturer. She is Honorary Fellow of the Law School, University of Hull where she was a senior lecturer for 15 years. Deborah has contributed to programmes on Channel 4 (Dispatches), BBC (Panorama, Watchdog, Watchdog Daily and Your Money Their Tricks) and BBC Radio 4 on consumer topics. She edits and contributes to *Butterworths Trading and Consumer Law* and has written a number of leading texts and a wide range of legal papers on consumer law topics.

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London      23 Jun

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£210 + VAT CLT Members/£450 + VAT Non-members

# Consumer Credit Litigation: The Changes

Intermediate | 3 hours CPD

This course provides a practical and informed review of the landscape of consumer credit law. You will gain an understanding of how to both challenge and defend regulated agreements.

The course will focus on:

Where are we now?

- The meaning of 'credit'
- What constitutes 'enforcement'
- Default fees
- Interest rates
- Default notice errors
- Conduct of CMC litigation, including costs liabilities in unsuccessful cases
- Consumer Credit Directive changes

Hot topics for the litigator

Speaker: **Richard Humphreys** is a partner in charge of the litigation section of the finance and leasing team at Blake Morgan. His clients include banks, independent finance institutions and manufacturer subsidiaries.

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London      27 Apr pm

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£140 + VAT CLT Members/£300 + VAT Non-members

## 12 Tricky Data Protection Points

Intermediate | 6 hours CPD

Data protection law is hitting the headlines as organisations and individuals struggle with complex rules regarding the protection and sharing of, and access to, personal data.

This course examines topical issues in data protection law which will enable you to advise businesses and individuals with more confidence.

Topics covered include:

- What is personal data?
- Sharing confidential data
- Outsourcing supervision
- Customer lists and preference services
- Freedom of Information Act
- Collection notices
- Complaints and penalties

Speaker: **Sue Cullen** is a solicitor specialising in information law and director of Amberhawk Training Ltd. She was previously a member of the information law Team at Pinsent Masons LLP, and is an accredited trainer for the ISEB qualifications in data protection, FOI and IT Law.

Or **Dr Chris Pounder** is a director of Amberhawk Training Limited, which he founded with Sue Cullen in August 2008. He writes and edits the magazine, *Data Protection and Privacy Practice* and runs a data protection/foi helpline. He speaks and writes on data protection and related matters and has given evidence before various Parliamentary select Committees on issues of privacy, data protection and security.

London 20 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

## An Introduction to Data Protection and its Practical Application

Best Seller

Foundation | 6 hours CPD

Since failure to comply with requirements can result in criminal as well as civil liability, no organisation can afford to ignore the issue of data protection.

Practically all businesses operating in the UK which hold information about individuals (whether they be employees, customers or anyone else) are affected by data protection laws.

This course is aimed at lawyers in private practice, in-house and in local authorities and will also be of interest to data protection officers. It provides a practical guide to how data protection works and how the principles must be applied in a variety of contexts. It will also provide essential guidance on the new EU developments in data protection.

It includes:

- The key principles, obligations and rights under the Data Protection Act 1998
- Access Requests
- Information management and document retention policies
- Workplace and employment rights
- The role of the Information Commissioner and enforcement
- Dealing with breaches of the Act
- Practical preparation for increased safeguards after 2015

Speaker: **Richard Morgan** is an independent IT consultant. For many years he was Computer Officer at the two Houses of Parliament. He is a founder member and a past Chair of the Society for Computers and Law.

London 12 May

£210 + VAT CLT Members/£450 + VAT Non-members

**12 March 2015**  
**Central London**

**Fees: £415 + VAT CLT Members/ £525 + VAT Non-Members**

**The EU is making significant progress on new data protection legislation which is to be adopted by the end of 2015.**

This conference will highlight key areas in which the Regulation will change existing requirements and will highlight ways in which attendees can start to prepare now for the new requirements.

## ***Chair***

Francis Aldhouse is a consultant to Bird & Bird, specialising in information law and policy. Until 2006, he was UK Deputy Information Commissioner. He had directed the registration, administration, complaints, publicity, investigations and strategic data protection policy functions for the Commissioner. In addition to being a solicitor he holds an LLM and an MSc in Management Studies.

## ***Speakers***

Ruth Boardman jointly heads our International Privacy and Data Protection Group. Her extensive experience includes advising a broad range of public and private sector organisations on information law matters, including representing them on their dealings with Data Protection Authorities and the EU's Article 29 Working Party. Ruth co-wrote Data Protection Strategy (Sweet & Maxwell), has edited the Encyclopaedia of Data Protection (Sweet & Maxwell), is on the editorial board of journal Data Protection Law & Policy, is a contributor to leading online data compliance tool [www.dataguidance.com](http://www.dataguidance.com) and has served on various boards of the International Association of Privacy Professionals.

Emma Drake is an associate in Bird & Bird's Privacy and Data Protection Group, having joined the firm as a trainee in 2010. She has provided detailed advice on a variety of subjects, including security breaches, data subject rights, employee monitoring and medical systems. Emma also has particular experience of co-ordinating and advising on international data transfer and compliance projects.

Elizabeth Upton is a senior associate in our Commercial Practice based in London. She advises clients on a wide range of data protection, privacy and freedom of information issues as well as procurement and contract law for IT matters. In the area of data protection she has advised on general compliance strategies for organisations and specific issues such as handling subject access requests, drafting privacy policies, licensing of databases and monitoring employees in the workplace. She has been involved in data protection audits for a number of large UK companies. Elizabeth regularly gives external conferences on data protection.

Gabriel Voisin is a member of Bird & Bird's International Privacy and Data Protection Group. He is a French qualified lawyer and his practice focuses on a range of French and international data compliance projects, including implementation of global data management strategies, international data transfers and local data compliance. He contributes to a range of publications including Data Guidance, IAPP, Expertises and BNA's Privacy & Security Law Report.

## 9.00

### **9.30 Chair's Welcome and Introduction**

*Francis Aldhouse, Bird & Bird*

### **9.45 Overview of Progress on the Regulation**

The European Commission proposal | Who are the key players? | Key changes proposed by Parliament & Council | Where are we now? | What is the timescale for agreement?

*Francis Aldhouse, Bird & Bird*

### **10.30 Key Concepts**

The Regulation amends and expands on current concepts (a broader definition of personal data and sensitive personal data). It will also introduce new obligations for data processors and joint controllers and introduces tougher restrictions on profiling | We will discuss all of these in detail, so attendees understand the new environment.

*Ruth Boardman, Bird & Bird*

### **11.15 Refreshments**

### **11.30 Data Transfers - Understand The New Rules Under The Regulation**

Recap on other recent developments | Is safe harbour still safe and what are processor binding corporate rules?

*Liz Upton, Bird & Bird*

### **12.15 Security Breaches**

Understand the new requirements for reporting security breaches | Work through the exemptions for reporting and how the new rules interact with existing requirements in other legislation.

*Gabriel Voisin, Bird & Bird*

### **1.00 Lunch**

### **2.00 Case study - Handling a Security Breach**

It is 4.30 on a Friday. You are the General Counsel of an international company and have just been notified by your head of IT that a security incident has occurred. What do you do next?

*Ruth Boardman and Gabriel Voisin, Bird & Bird*

### **2.30 Privacy Impact Assessments and Privacy by Design**

Learn about the new requirements for Privacy Impact Assessments and Privacy by Design | What are the core elements of a successful Privacy Impact Assessment? | Understand what this means in practice by working through a Privacy Impact Assessment case study.

*Ruth Boardman, Bird & Bird*

### **3.00 Refreshments**

## **Prepare now for the new requirements**

### **3.15 Sanctions, Enforcement and The 'One Stop Shop': What Are The New Rules?**

Enhanced sanctions for breach | Understanding the revised role of data protection authorities | A limited 'one stop shop' for regulation | Which data protection authority can take action | Joint investigations & the co-ordination mechanism | Where can an individual complain or sue.

*Francis Aldhouse, Bird & Bird*

### **4.00 What's New Apart From The Regulation?**

New cases and guidance in the UK and Brussels.

*Emma Drake, Bird & Bird*

### **4.45 Chair's Concluding Remarks and Questions**

## 5.00

# Intellectual Property Law for Commercial Lawyers

Foundation | 3 hours CPD

This course is aimed at general commercial lawyers who are non-IP specialists. It provides an overview of the key intellectual property rights and areas of intellectual property law. It aims to equip commercial lawyers with what they need to know in this area when dealing with business clients.

It considers how intellectual property rights can protect valuable aspects of a client's business and how these rights come into existence, are enforced and can be exploited.

Topics covered include:

- Inventions and patents
- Trade marks and passing off
- Copyright and database rights
- Design rights
- Confidential information

Speaker: **Lorna Brazell** is a solicitor advocate and joined the Intellectual Property Disputes group in Osborne Clarke's London office in 2013 to head up the patent litigation practice, bringing 19 years' experience in a wide range of technologies from her previous role at Bird & Bird.

---

London      21 Apr am

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£140 + VAT CLT Members/£300 + VAT Non-members

# Drafting and Negotiating IP Licences

Intermediate | 3 hours CPD

Exploitation of intellectual property rights is a lucrative commercial area in today's business world and this course is aimed at commercial practitioners involved in this area, covering the fundamental aspects and up-to-date case law and practice in granting intellectual property licences.

The course will be of benefit as a refresher to experienced practitioners and will provide useful guidance to those relatively new to the discipline. It will examine real clauses and will cover:

- Tips for negotiating and drafting IP Licences
- Defining the grant of IP rights, in terms of exclusivity, duration, territory and sub-licences
- The effect of EU and UK competition law on IP licences
- Revenue collection under IP agreements - minimum guarantees, royalties and advances, generating royalty reports
- Management controls in IP licences including approval rights, marketing obligations and auditing accounts

Speaker: **Frank Jennings** is a partner and head of the commercial team at DMH Stallard LLP. He specialises in technology law, intellectual property rights and commercial contracts. Frank qualified in-house with a computer games subsidiary of Sony.

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London      18 Mar pm

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£140 + VAT CLT Members/£300 + VAT Non-members



## IP and IT Law Update

**Hot  
Topic**

Update | 3 hours CPD

This course examines a broad range of issues and recent developments in IP and IT law with emphasis on the implications for IP/IT law practitioners.

It covers everything from patents, designing copyright and trade marks, confidential information and data protection with a round-up of all the key new cases and legislation. Topics covered include:

- Patents
- Confidential information
- Designs
- Trade marks
- Copyright
- Competition
- Data protection
- Freedom of information
- Information security
- Domain name disputes
- Regulation of investigatory powers
- News round-up
- The *Google Adwords* decision of the ECJ
- The *Lucasfilms* copyright decision
- The Digital Economy Act 2010
- The *BSkyB vs. EDS* decision

Speaker: **Lorna Brazell** is a solicitor advocate and joined the Intellectual Property Disputes group in Osborne Clarke's London office in 2013 to head up the patent litigation practice, bringing 19 years' experience in a wide range of technologies from her previous role at Bird & Bird.

London 14 Apr am

£140 + VAT CLT Members/£300 + VAT Non-members

## Understanding and Managing Intellectual Property Disputes

Foundation | 5 hours CPD

This course provides an introduction to intellectual property disputes. It is aimed at in-house counsel who need to understand how to manage IP disputes and also at litigators who are looking to develop their IP practice.

IP 'Associate to Watch' Martin Noble will identify how disputes arise and how to assess the strength of your own or an opponent's position. It will also assist in formulating a strategy for dealing with the dispute. You will have the opportunity to work through practical case studies in order to see how IP law works in the real world.

Topics covered include:

- Assessing IP rights, their ownership and validity
- Pre-action and interim relief, including pre-action disclosure, Norwich Pharmacal orders and interim injunctions
- Letters before action
- ADR
- Issue of proceedings and statements of case
- Disclosure, witness statements
- Expert evidence
- Inquiry as to damages/account of profits
- Trial
- Costs

Speaker: **Martin Noble** is a legal director of Shakespeares Legal LLP. Martin has managed IP disputes across jurisdictions, in the English High Court, the Intellectual Property Enterprise Court and through ADR. He also advises on IP aspects of commercial deals and exploitation of rights.

London 16 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## Drafting IT Agreements - The Essential Guide

Intermediate | 3 hours CPD

This course looks at the fundamental elements of a range of common IT agreements, such as software and hardware development, distribution and licensing agreements and systems implementation agreements, to assist the commercial practitioner in drafting and negotiating agreements in this area.

The course will examine real clauses and will include:

- Tips for drafting IT agreements
- Scoping the IT project - who should draw up the specification, how detailed should it be, does a lawyer need to know the technical jargon?
- Defining the development or implementation phases, including managing changes to the specification, building useful acceptance testing procedures and structuring milestone payments
- Ownership vs. licensing of IT, individual or multi-user rights, use by third parties
- The effect of EU and UK competition law on IT agreements
- Support and maintenance, and Service Level Agreements - setting the standards, assessing compliance and addressing non-compliance
- Drafting warranty, indemnity and liability clauses in the light of recent case law
- Other key clauses in IT agreements - escrow arrangements, ensuring business continuity, termination and its consequences

Speaker: **Frank Jennings** is a partner and head of the commercial team at DMH Stallard LLP. He specialises in technology law, intellectual property rights and commercial contracts. Frank qualified in-house with a computer games subsidiary of Sony.

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London 18 Mar am

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## Best Practice for IT and Outsourcing Contracts

Intermediate | 6 hours CPD

The failure to pay close attention to the nuances of IT contracts is a recipe for dispute. This course mixes the best practice in IT contracts with a review of outsourcing IT contracts. The course reviews some of the issues currently troubling customers, service providers and advisers, including:

### IT Contracts

- Key issues to consider in relating to the scope of the software licence;
- Ensuring robust acceptance testing
- Avoiding the traps related to the provisions dealing with upgrades, updates, new versions and new releases
- Understanding the various approaches to intellectual property
- Ensuring the technical/operational schedules align with the 'front-end' legals

### Outsourcing Contracts

- The appropriateness of post-contract verification
- Latest developments in limitations and exclusions of liability
- Getting the benchmarking provisions right
- Ensuring a balanced approach to step-in rights
- Best practice for contract renewals and exit management

Speaker: **Samitha De Silva** is a partner and is the head of the IT and Outsourcing practice at Manches LLP. He is recognised as a leading individual for IT in the most recent editions of the *Legal 500* and *Chambers & Partners* directories.

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London 5 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

## Big Data - What are the Legal Challenges?

Intermediate | 3 hours CPD

Big data was the hot topic for 2013. The amount of data being collected grows at an ever increasing rate. The advance in technology and the take up of new data processing models, such as cloud computing, presents opportunities and specific legal challenges.

This practical course provides a unique practical and legal insight into how to manage the challenges.

Issues covered include:

- The uses of big data
- Privacy
- Data protection
- Security
- Storage and retention
- IPR

Speaker: **Gillian Cordall** is a solicitor at Keystone Law with 20 years' experience specialising in IT, intellectual property and commercial contracts, with particular expertise in software development, social media and interactive entertainment. She is a member of the Media Board of the Society for Computers & Law.

**Hot  
Topic**

London 23 Apr am

£140 + VAT CLT Members/£300 + VAT Non-members

## Overview of Digital and Social Media Law

Intermediate | 6 hours CPD

Digital media is not just maintaining a corporate website or even making products and services available but also setting up blogs, participating in forums and using Twitter, Facebook, LinkedIn and other sites.

This course gives an introduction and overview of the legal risks associated with all elements of digital and social media. It will be of interest to all commercial and corporate practitioners who do not deal with digital and social media law on a regular basis but need to have a working knowledge of it. It will also be useful to those joining the relevant department dealing with digital and social media law either in private practice or in-house.

It includes:

- Overview of social and digital media and key terminology
- Identifying key areas of risk with social and digital media:
  - Operational risks
  - IP and online infringement
  - Privacy and confidentiality
  - Data protection
  - Defamation
  - Other content liability issues

Speaker: **Sherree Westell** is a solicitor with over 20 years' commercial law experience with particular expertise in IT, digital and social media as well as IP. She now works as a consultant for Belgravia law firm, Woodroffes, on a range of IT, digital and social media projects.

**Best  
Seller**

London 4 Mar

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# 36

## Live Webinars

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### A Year of Change: Key IP Cases in 2014

This webinar is aimed at in-house and private practice IP lawyers representing organisations and clients across all industries. It will highlight and comment on a selection of key English and European IP cases of 2014, including trade marks and passing off, copyright, designs and patents.

**Speaker: Ben Mark** is a senior associate in RPC's IP team. Ben advises on all aspects of intellectual property protection and enforcement, with a focus on trade marks, copyright and designs. Ben works with clients across a wide range of industries, including retail, online/e-commerce, financial services and insurance.

**27 Feb | 1.00pm - 2.30pm**

### Insider Dealing

The offence of insider dealing continues to attract attention, perhaps because of the very personal nature of the circumstances surrounding the commission of any offence. The statutory provisions which outlaw relevant forms of behaviour are complex and have not always seemed suitable for securing convictions where criminality has appeared obvious. Electronic trading systems and the possibility of dealing in very short time spans have made factual analysis potentially more difficult.

**Speaker: Mark Cardale** is a corporate lawyer and worked for many years with Slaughter and May. He acquired an interest in corporate governance while head of the firm's then New York office during the era of Enron and other corporate accounting scandals in the US.

**6 Feb | 1.00pm - 2.30pm**

### Which Law Applies?

With increasing frequency, international parties are litigating in English courts, just as our own companies and their management are being pursued in foreign settings. With the globalisation of trade and the ease of foreign travel choice of law has assumed an enhanced significance. Knowing your way around the two Rome Regulations and English common law in this area has become important knowledge for legal advisers in the UK.

**Speaker: Ian Gascoigne** is a solicitor and a partner of Eversheds LLP in its commercial dispute resolution group. He handles most forms of commercial litigation and has considerable experience of international arbitration. He trains lawyers on a variety of litigation subjects.

**23 Jan | 1.00pm - 2.30pm**

### Whistleblowing - A Practical View

Whistleblowing has been an important part of major corporate governance scandals, from Enron through to this summer's accounting problems at Tesco; but it also has many implications for companies and other organisations on a day-to-day basis.. Information technology has vastly increased the amount of information available to employees, and the scope for its misuse, without necessarily making easier the discovery and appropriate reporting of issues within an organisation.

**Speaker: Mark Cardale** is a corporate lawyer and worked for many years with Slaughter and May. He acquired an interest in corporate governance while head of the firm's then New York office during the era of Enron and other corporate accounting scandals in the US.

**20 Feb | 1.00pm - 2.30pm**

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## A Year of Change: Key IP Cases in 2013

Speaker: Ben Mark

## Advising and Defending Directors of Insolvent Companies

Speaker: Tony Sampson

## Advising Directors of Failing Companies

Speaker: Tony Sampson

## Boilerplate: What's New in 2014?

Speaker: Keith Lewington

## Building a Successful Insolvency Team

Speaker: Tony Sampson

## Charging Orders and Orders for Sale

Speaker: Stephen Allinson

## Claims Against Directors

Speaker: Tony Sampson

## Clicks and Mortar: Intellectual Property for Retailers

Speaker: Robert Cumming

## Commercial Agents Regulations: What You Need to Know

Speaker: Christopher Tayton

## Competition Law: Dawn Raids

Speaker: Iain Larkins

## Consumer Remedies - New B2C Contracts

Speaker: Helen Swaffield

## Costs and Insolvency: Making Sense of This Confusing Area of Law

Speaker: Stephen Allinson

## On-demand webinars

### Damages in Contract Law: A Refresher and Update

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### Essential Contract Law Update Autumn 2014

Speaker: Helen Swaffield

### FCA Enforcement: Lessons from the First Year

Speaker: Victoria Lindsay

### IP Enforcement in The Era of Social Media

Speaker: Rosie Burbidge

### Is He Good For the Money? Profiling the Debt and the Debtor Before Enforcement

Speaker: Stephen Allinson

### Lasting Powers of Attorney in a Business Context

Speaker: Caroline Bielanska

### Penalty Clauses after *Makdessi*: a Re-formulation of the Dunlop Test

Speaker: Helen Swaffield

### Signature and Execution of Documents: a Refresher

Speaker: Helen Swaffield

### *Specsavers vs. Asda*: Anatomy of a Trade Mark Dispute

Speaker: Antony Gold

### Statutory Demands and Winding Up Petitions - The Inside Track

Speaker: Jeremy Richmond

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January 2015 Onwards

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  3. Submit part A portfolio
  4. Register as a Probationary Representative with the LSC
  5. Complete the portfolio and the CIT
- [psr@clt.co.uk](mailto:psr@clt.co.uk)**



# Advanced Police Station Practice - 2015 Update

Update | 6 hours CPD

This course is designed to give experienced police station defence practitioners a complete and thorough update. You will be provided with a comprehensive set of materials including all significant developments in criminal law, procedure and practice including the 2008 amendments to PACE. All recent changes that relate to police station work will be specifically highlighted and discussed. The course will also use example case studies to create forums for open led discussions about awkward and topical issues, thus creating a knowledgeable and friendly environment where experiences can be shared and lessons learned.

Topics covered include:

- Recent case law - its impact upon police station practice
- Recent legislative changes relating to the police station
- The 2008 PACE and Codes of Practice amendments
- Recognising and dealing with conflict - why it helps
- Fixed fees and being efficient - making a living!
- Case studies - a chance to discuss and consider issues in context

Speaker: **Matthew Hickling** is a non-practising solicitor and an experienced litigator and advocate. He is a consultant and trainer, and is the lead assessor and examiner for CLT in the Criminal Litigation Accreditation Scheme (CLAS).

Leeds	14 May
London	21 May

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## Criminal Law: 2015 Update

Intermediate | 6 hours CPD

Changes are happening quickly, can you afford to be left behind?

This popular programme keeps you up-to-date with all relevant changes and developments in criminal law, criminal practice, procedure, evidence and sentencing.

Matthew Hickling will cover the following topics:

- A complete update on LASPO including all of the major commencements in December 2012
- Details of the Crime and Court Bills 2013
- Relevant commencements of the Protection of Freedom Act 2012
- An evaluation of all of the most important judgments to affect general criminal practice in 2013

Speaker: **Matthew Hickling** is a non-practising solicitor and an experienced litigator and advocate. He is a consultant and trainer, and is the lead assessor and examiner for CLT in the Criminal Litigation Accreditation Scheme (CLAS).

Leeds	10 Mar
Birmingham	17 Mar
London	26 Mar

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## Hot Topics in Criminal Evidence

**Hot  
Topic**

Update | 6 hours CPD

Despite being one of the most rapidly developing areas of law, criminal evidence can be the most overlooked. Whether at court or in the police station, you can very quickly become out-of-date. Modern advances in the use of evidence include electronic data recovery and the use of social media. This course will ensure that you are fully up-to-date with all of the important recent developments including legislation and judgments.

The day will include:

- The use and abuse of social media - Is Code D dead and buried?
- Electronic hearsay - Mobiles, computers and digital media
- Competence - Domestic violence, statements and live evidence
- Compellability - Time to call time on reluctant witnesses
- Live links - Monitoring, managing and examining the processes
- Victim empowerment - Using court discretion to exclude
- Drugs - Proof, confessions, officer 'experts' and forensics

Speaker: **Matthew Hickling** is a non-practising solicitor and an experienced litigator and advocate. He is a consultant and trainer, and is the lead assessor and examiner for CLT in the Criminal Litigation Accreditation Scheme (CLAS).

London	23 Jun
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# Representation in the Youth Court - What You Need to Know

Intermediate | 6 hours CPD

MPs and Peers have called for “mandatory specialist training for criminal lawyers working with children” because it seems there is a perception that youth court law is “less complex” than adult court law. The result of this misconception is poor representation, needs not being identified and inappropriate sentences being advocated.

CLT are pleased to be able to offer the expertise of the Youth Offending Service in providing a course that will give an understanding of the wider issues involved in representing Youths, the sentencing options available and enabling delegates to get the best outcome for their Youth clients.

This course provides an outline of the relevant legislation and practical examples of how it is applied. It will take you through a journey of the criminal justice system as it applies to youths; from the police station through to appearing in Court and the issues that arise throughout.

Speaker: **Hakan Pettersson** obtained a Diploma in Social Work from Sheffield Hallam University in 1994. From 1994 up until 2000 I worked for Reed Care as an agency social worker in a number of different settings mainly with young people in care

Hakan started to work for the Youth Offending Service in Leeds 2000 and for the majority of this time he has been based in the specialist court team. This has given him extensive experience of providing advice to solicitors, magistrates, barristers and the judiciary on the legislation that dictate how both the youth court and Crown Court can deal with young people that come before them. He has also spent some time working around the city directly supervising young people subject to orders imposed by the courts.

<b>Birmingham</b>	<b>3 Jun</b>
<b>London</b>	<b>10 Jun</b>
<b>Manchester</b>	<b>17 Jun</b>

£150 + VAT CLT Members/£420 + VAT Non-members

# Magistrates’ Court Trial Advocacy

Intermediate | 6 hours CPD

This course has been specifically designed to help advocates conduct trials in a magistrates’ court. It recreates the trial process in a non-threatening educational environment, where practitioners can develop their skills without fear. During the day, delegates will experience all of the participating trial roles. With strictly limited numbers, personal audio visual recordings and one-to-one tuition sessions, the day will include:

- Preparing for trial - The essential guide to managing your materials
- Trial issues - Dealing effectively with evidential issues arising on trial day
- The prosecutor’s opening - What to look for and what to make a note of
- Examination in chief - Following the rules while making your points
- Cross-examination - The focus of your advocacy where cases can be won
- Closing - How to succinctly gather and present the relevant points
- Dealing with difficult witnesses - How to remain polite and persuasive

Speaker: **Matthew Hickling** is an experienced Litigator and Advocate. He is now a Consultant and Trainer in legal skills and legal practice. Formerly a Detective Inspector in the police before qualifying as a Solicitor in 1990, Matthew is now the lead Assessor and Examiner for CLT in the Criminal Litigation Accreditation Scheme (CLAS).

<b>London</b>	<b>19 May</b>
---------------	---------------

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## Defending Sexual Offences - Practical Trial Tips

Intermediate | 6 hours CPD

This course will compare the differences between this special type of case and other criminal offences, including issues of bad character and disclosure where more likely the complainants are going to be young or vulnerable;

It will examine pre-trial issues such as the importance of the Defence Statement, dealing with other witnesses, dealing with hearsay evidence and knowing when to exclude satellite issues.

There will be a practical examination of dealing with disclosure; what to request, how to challenge any refusal by the Crown to disclose, how to get documents from another Court and how to use that evidence.

The course will conclude with a look at issues at trial, including cross-examination of young and vulnerable complainants, interpreters, applications made during trial and re-visiting pre-trial applications. It will also look at the issues at trial of multiple complainants.

Speaker: **Gemma Stokes**, is a practising barrister at Fenners Chambers in Cambridge. She specialises in all forms of criminal law. Prior to being called to the Bar in 2013 she was a Solicitor Advocate and has considerable experience in providing police station advice and conducting criminal trials of all levels and especially in defending sexual offences including multi complainant and interfamilial rape cases. Gemma has previously been a qualified Duty Solicitor.

London	2 Jun
Leeds	4 Jun

£150 + VAT CLT Members/£420 + VAT Non-members

## Interviewing Witnesses: How to Unlock Their Memories

Intermediate | 6 hours CPD

Cognitive interviewing is a tool which can be employed by all litigators to maximise a client or witness's recollection of events. It uses a series of memory retrieval techniques to increase the amount of information that can be obtained from a witness or client. Cognitive interviewing is much more effective than simply asking questions, which interrupts the witness and restricts the natural flow of information.

This practical course, which is suitable for all litigators, trains you to use cognitive interviewing, which is successfully used in some of the largest UK law firms. Using cognitive interviewing will increase the completeness and accuracy of what your witnesses can remember, helping them to remember clearly things that happened many months, or even many years ago.

It will also enable you to:

- Assess litigation risks and make decisions about a case
- Prepare cases and take statements based on the full facts
- Obtain up to 40% more relevant information
- Obtain uncontaminated evidence from witnesses
- Obtain more facts and details from witnesses first time, reducing the need for costly re-interviews

Speaker: **Dave Barney** specialises in training lawyers in interviewing and investigating techniques. He has trained over 3000 lawyers in the last 15 years and has worked with all of the top 10 UK law firms.

Or **Geoff Coughlin**, FITOL, MCIPD, has had wide experience of managing and training solicitors, managers, police officers and trainers in the private and public sectors.

London	12 Mar, 18 Sep
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£210 + VAT CLT Members/£450 + VAT Non-members

### Cross-Examination in Crime - Improving Your Technique

Intermediate | 6 hours CPD

Cross-examination can win cases, but more often it is a reason why cases are lost. This course will assist you in developing and improving your cross-examination techniques through role play, so that you will leave with practical skills that can be put into practice immediately.

Topics covered will include:

- Purpose of cross-examination
- Case analysis
- Questioning styles
- Structuring your cross-examination
- Facts vs. assumptions
- Witnesses of fact
- Expert witnesses
- Pitfalls when cross-examining
- Key points
- Tactics - rapid fire or scatter gun

This course is interactive and will give you the opportunity to practice cross-examination, and receive feedback on your performance and suggestions for improvements.

Speaker: **Leslie Cuthbert** is a solicitor-advocate (higher court criminal). Leslie is a consultant with McCormacks LLP and also sits as a road user charging adjudicator. He is an experienced advocacy trainer.

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London      11 Mar

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£150 + VAT CLT Members/£420 + VAT Non-members

### Criminal Court Advocacy: Moving up a Gear

Advanced | 6 hours CPD

You attend the Magistrates Court daily. You have a measure of experience but you want to change up a gear. This course will assist you to develop confidence and assurance as an advocate in the criminal courts.

Emphasis will be placed on preparation of the contested case:

- Case Analysis
- Case Construction
- The Closing Speech
- The Examination of Witnesses

This is a day for the enhancement of your skills as an advocate, your case construction, and your readiness for trial. This is intended to be a pure advocacy course. There may be occasional or incidental attention given to the evidential landscape but the focus is on advocacy skills.

Speaker: **Christopher Green**, is a solicitor-advocate (higher court criminal) who practices in Cardiff. He is a consultant and former senior partner with Claude Hornby and Cox.

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London      20 Mar

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£255 + VAT CLT Members/£465 + VAT Non-members



## Confiscation and Forfeiture: Principles and Procedure

Intermediate | 6 hours CPD

After emphasising the civil law principles behind the working of the Proceeds of Crime Act 2002, this course concentrates on procedure, practice and case law in the operation of two central legislative powers.

First is a summary of the seizure of cash derived from 'unlawful conduct'. The second is the forfeiture of criminal assets by the Crown Court, including analysis of 'criminal lifestyle', criminal benefit and tainted gifts.

Finally the issues of funding and costs are covered, which include:

- Funding
- The legal and institutional regime
- Legal powers
- Cash detention and forfeiture in the magistrates court
- Confiscation of assets in the Crown Court

Speaker: **Tony Thorndike** is a practising barrister at Central Chambers in Manchester who specialises in prison law.

London 21 Apr

£150 + VAT CLT Members/£420 + VAT Non-members

## Inquests: Guidance from a Coroner

Intermediate | 3 hours CPD

**Accredited by APIL - Litigator, Senior Litigator**

Substantial changes to the coronial law were introduced in July 2013 and this course provides a comprehensive guide to the new law for practitioners advising or representing potential claimants, defendants, witnesses or family members where a death has arisen. It will be particularly useful for personal injury and clinical negligence lawyers.

The course will cover:

- The reforms to coronial law including the role of the Chief Coroner
- The functions of the Coroner, including control of the body
- Processes designed to hasten inquiries and the listing of inquests
- Preparation for and procedure at the inquest including improved disclosure
- Funding of representation
- The scope and purpose of the inquest
- The expanded remit of the inquest under the Human Rights Act
- Verdicts including Neglect, Unlawful Killing and Narrative

Speaker: **Sheriff Payne** is HM Senior Coroner for Bournemouth, Poole and county of Dorset and has many years of coronial experience having previously been appointed Deputy Coroner in 1983. He also has had litigation experience in a busy private practice.

London 6 Mar am  
Manchester 19 Mar am

£140 + VAT CLT Members/£300 + VAT Non-members

# Legal Aid Supervision: An Introduction

Foundation | 7 hours CPD

This course has specifically been designed for those who are stepping into the role of legal aid supervisor or deputy for the first time.

The course has been written with the demands upon supervisors under the SQM and legal aid contracts in mind, and explains the role of the legal aid supervisor and the management skills needed to be effective.

Court content:

- It meets the generic requirements for supervisor status on page 1 of the LAA Supervisor Form
- Meets the requirements of the 2015 own and duty crime contracts
- Covers supervision requirements in the 2013 legal aid contract
- Covers SQM 2013 and Lexcel 5 requirements for supervision and file review
- Practical supervision - day to day techniques for better file compliance
- Hints and tips for dealing with legal aid audits
- Building relationships and credibility
- Time management.

Outcomes focused regulation makes the effective running of the firm a matter of professional conduct. It requires effective systems for supervision, risk management and delegation, and expects training to ensure the competence of all personnel in performing their duties. This course will help you meet this requirement.

Speakers: **Vicky Ling**, BSc MPhil, is a specialist legal aid consultant, member of the Low Commission and formerly managed a CAB, a law centre and a housing advice centre, as well as implementing the then Legal Aid Board's quality assurance standard and **Matthew Moore** is the Director of Consultancy Services with Infolegal Ltd – specialist compliance and practice management advisers to the legal profession – and is also a consultant solicitor with the regulatory specialists Jayne Willetts & Co.

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<b>Bristol</b>	<b>4 Feb</b>
<b>Manchester</b>	<b>11 Feb</b>
<b>London</b>	<b>18 Feb</b>
<b>Leeds</b>	<b>25 Feb</b>

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£210 + VAT CLT Members/£450 + VAT Non-members

# Increasing Privately Funded Criminal Work **NEW**

Intermediate | 6 hours CPD

The changes to legal aid and the swinging reductions in fees are putting criminal practitioners under huge financial pressure. Practitioners will be keen to increase the amount of privately funded criminal work they receive, not only to bridge the gap but also as it is more profitable. This course, led by a Solicitor Advocate whose practice is now 50% privately funded work, will explain how to increase that work and manage it efficiently and profitably.

## Planning

- Where are you now? • What do you want to achieve? • Who is in your client base? Changing legal market: how do you get private work?

## People, pricing and products

- Skills and service audit what sets you apart? • Motivating the team to change and to develop business.

## Branding and repositioning

- Generating awareness and leads • The web and social media • Winning new business.

## Managing and converting enquiries

- Enhancing the client experience and existing client management • Nurturing referrers and intermediaries.

## Developing your plan

- Measuring performance • Partner/lawyer personal marketing plans.

## Costs implications

Speaker: **Kenneth Carr** is a solicitor advocate and recorder and a founding member of Perren Buildings Chambers and a consultant with Sternberg Reed, Solicitors. Ken is a member of both the VHCC and Serious Fraud Panels.

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<b>London</b>	<b>14 May</b>
<b>Leeds</b>	<b>20 May</b>

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4 February 2015  
Central London

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These remain challenging times in regulatory law.

The tensions between the declared intention of Government to take a balanced approach to regulatory action and the enthusiasm of some regulators are substantial. Critics say enforcement decisions sometimes seem to be driven by public perception and the opportunity to seek Proceeds of Crime Applications. Businesses, and others who are regulated, face increasing reputational risk and, if convicted, fines which are growing larger by the month.

This conference, aimed at regulatory lawyers, will help you meet the needs of the client with a selection of speakers all of whom are undoubtedly leaders in their fields of practice.

## *Chair*

David Travers QC practices regulatory law from 6 Pump Court which was 'Health and Safety Chambers of the Year 2013'. He is unique at the Bar in being recommended in both independent guides to the legal profession as a leading barrister in the three fields of consumer law, health and safety and environmental law. The 'Guide to the UK Legal Profession' says he has an "extremely charming court manner, but can be ruthless when he needs to be. An intelligent yet highly commercial advocate," "Outstanding in conferences and in court." and says he is "very good at dealing with large, complex cases" the Legal 500 praises his 'charming and disarming style of advocacy'. David is also a published academic and Visiting Professor in Business Accountability at The University of South Wales.

## *Speakers*

Guy Bastable specialises in crisis management and dispute resolution in relation to business crime and regulatory enforcement. He is a leading lawyer in the UK for corporate manslaughter, health and safety, criminal fraud, insider dealing, and money laundering. Guy has particular expertise in fatal accidents and has successfully defended both organisations and individuals.

Lee Bennett is ranked as a 'leading junior' in Chambers and Partners (health and safety) and the Legal 500 (consumer and health and safety). He is a specialist regulatory barrister with a practice encompassing the range of regulatory work, but with an emphasis on health and fire safety, trade and consumer, environmental, and food safety law.

Sarah Clarke has worked at West Berkshire Council for over 10 years, practising predominantly in the field of regulatory enforcement. Sarah's practical experience covers the full range of local authority prosecution work, dealing with both contested and uncontested matters. This includes significant high profile cases dealt with in the Crown Court.

Jon Cooper is a partner heading up the health and safety team at Bond Dickinson LLP. He has been involved in many of the major cases in recent years including Buncefield, New Look, Corus Port Talbot and the Channel Tunnel rail link explosion. He has been recognised as a leading practitioner in health and safety for many years and in the recent edition of Chambers guide it is said that 'He is generally acknowledged to be the leading health and safety solicitor in the country'.

David Hercock is a barrister practising from 6 Pump Court. He specialises in regulatory law and he has particular expertise in health and safety, fire safety, environmental, food and consumer law. David has significant experience of regulatory prosecutions, statutory appeals, inquests, tribunal proceedings and judicial reviews.

Oliver Saxby QC is a specialist criminal advocate and took silk in 2013. He has particular interest in gross negligence manslaughter (successfully represented Michael Hubble, the Officer of the Watch on board the P&O ferry the Pride of Bilbao charged with the manslaughter of three yachtsmen out sailing in the Solent), corporate manslaughter, regulatory crime and asset recovery.

Mark Watson is a specialist regulatory barrister and short-listed by Chambers & Partners in 2013 for the 'Health & Safety Junior of the Year' award. Specific areas of speciality are health & safety, fire safety, maritime safety, environmental law, food safety and consumer protection. Regulatory Panel 'A' list.

## 9.00

### 9.30 Chair's Welcome and Introduction

David Travers QC, 6 Pump Court

### 9.45 First Contact - How to Deal with the Regulator's Knock on the Door

Criminal liability for organisations, directors and employees | Investigation risks | Investigators' powers | Preparing the client in advance | Defending the investigation.

Guy Bastable, BCL Burton Copeland

### 10.00 Enforcement and Prohibition Notices

Types of 'enforcement notice' in regulatory proceedings | Improvement notices and prohibition notices in health and safety matters | Case study: appealing an improvement or prohibition notice | Other developments - fee for intervention and deferred prosecution agreements.

Lee Bennett, 6 Pump Court

### 10.45 Refreshments

### 11.00 How to Defend Well

How to avoid prosecution | Review of the prosecution case | Conduct of the defence - practical considerations.

Sarah Clarke, West Berkshire Council

### 11.45 Food Safety Prosecutions

The scope of the responsibility | Fashions and foibles from "milk" to "organic" and "home-made" to "natural" | Understanding the relationship between risk and likelihood | Addressing failings amongst staff | The due diligence defence.

David Travers QC, 6 Pump Court

### 12.30 Questions

### 12.45 Lunch

### 1.45 Fire Safety

The fire safety duties | Risk and foreseeability | Offences and defences.

David Herccock, 6 Pump Court

### 2.30 Corporate Manslaughter - Where Are We Going?

The cases to date | What do they tell us? | Has the Corporate Homicide and Manslaughter Act 2007 delivered? If no, why not?

Jon Cooper, Bond Dickinson

### 3.00 Refreshments

## Essential for all regulatory lawyers: helping you to meet the needs of your clients

### 3.15 Sentencing in Regulatory Proceedings

The Environmental Offences Sentencing Guideline | The Draft Health & Safety Offences Sentencing Guideline | Recent sentencing cases.

Mark Watson, 6 Pump Court

### 4.00 Confiscation in Regulatory Proceedings

Basic principles | Recent case law | The future.

Oliver Saxby QC, 6 Pump Court

### 4.45 Chair's Concluding Remarks and Questions

## 5.00

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## Dealing with Minor Offences in the Magistrates Court

Speaker: Yimi Yangye

## Defending Motorists: Recent Developments

Speaker: Barry Culshaw

## Defending Speeding Allegations

Speaker: Barry Culshaw



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A close-up photograph of a man in a dark blue suit and tie, holding a silver pen over a white document. The background is blurred, showing an office setting. The image is used as a background for the entire page.

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## Employment Law Webinars

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## Modern Workplaces and the Changing Face of Maternity, Paternity and Flexible Working **NEW**

Intermediate | 3 hours CPD

This half-day course will deal with the current law and practice relating to maternity and parental rights, including adoption leave and the handling of IVF treatment and other antenatal rights.

It will also deal with the changes on the horizon to flexible and parental leave and the implications of *Montull vs. Instituto Nacional de la Seguridad*.

Speaker: **Catherine Wilson** is an employment law specialist with over 20 years' experience of all aspects of employment law but particularly discrimination and whistle blowing matters.

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London 18 Jun pm

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£140 + VAT CLT Members/£300 + VAT Non-members

## Expanding your Employment Practice **NEW**

Intermediate | 6 hours CPD

Attending this seminar will show you how to turn your employment practice into the best it can be to ensure a lucrative and lasting future.

You will learn how to:

- Put together and implement a niche marketing strategy that suits your business;
- Make and keep relationships that will ensure your clients come back to you time and time again;
- Make PR work for you;
- Get the right social media strategy for you;
- Recognise if your website is working for or against you;
- Set yourself apart from the competition;
- Increase your conversion rates;
- Monitor your success and know when to tweak or change direction for success.

If you are looking to take your employment practice to the next level, this course will show you how.

Speaker: **Carolyn Mumby** is founder and CEO of Employment Law Essentials Limited which provides an HR Portal to Law Firms from top 100 firms to sole practitioners. Previously, Carolyn was Legal Services Director for a national employment law consultancy. Carolyn is an experienced teacher, trainer and public speaker engaging with employers, managers and other lawyers since 2005 using a wide variety of online marketing tools.

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London 10 Mar  
Leeds 17 Mar  
Birmingham 24 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

# Unfair Dismissal - A Practical Overview **NEW**

Foundation | 6 hours CPD

Unfair dismissal continues to be central to the work of the employment lawyer, whether advising or litigating. This course will cover the principles which underpin this area of the law, and put them into a practical framework, making use of problems, case studies and interactive discussion. It will deal with:

- constructive dismissal: including fundamental breach, factors causing the resignation, delay and the last straw doctrine
- continuity of employment: umbrella contracts and deemed continuity
- employment status: the written contract and the role of reality
- potentially fair reasons under the Employment Rights Act
- interpreting and applying the ACAS Code of Practice
- the band of reasonableness
- Polkey reductions and contributory conduct
- remedies: reinstatement and re-engagement, calculating compensation

If you want to have a thorough grounding of this important area of employment law, you should attend this course.

Speaker: **John Sprack** has 14 years' experience as an Employment Judge. He is an experienced CPD trainer. He was formerly Reader at City Law School where he taught employment law and advocacy for 11 years on the Bar course. He is the author of a number of employment law publications.

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<b>Birmingham</b>	<b>27 Apr</b>
<b>Leeds</b>	<b>29 Apr</b>
<b>London</b>	<b>6 May</b>

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£210 + VAT CLT Members/£450 + VAT Non-members

# Unconscious Bias **NEW**

Intermediate | 3 hours CPD

This powerful session is aimed at all lawyers and support staff whatever their role and responsibilities within the firm.

What will be covered:

- Getting an understanding of exactly what bias is
- Acknowledging the part played by power, our likes, dislikes, prejudice, stereotypes and experiences and how we filter the messages we receive in every day-to-day contact with others
- Recognising the 7 bias effects that are most common and finding practical ways to manage them
- How bias can affect decision-making and judgement in everyday legal practical ways to manage them
- How bias can affect decision-making and judgment in everyday legal practice with special focus on: who and how the firm selects new staff; witness interviewing and the firms culture
- Unconscious bias and how it contributes to 'wilful blindness' and what this can mean for your individual practice and behaviour AND your firm's profitability
- Sharing practical tips and strategies for keeping personal bias in check and managing it effectively

Speaker: **Geoff Coughlin**, FITOL, CMCIPD, has had wide experience of managing and training solicitors, managers, police officers and trainers in the private and public sectors.

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<b>London</b>	<b>5 May pm</b>
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£140 + VAT CLT Members/£280 + VAT Non-members



## Fitness for Work - Masterclass **NEW**

Masterclass | 6 hours CPD

This one day Masterclass will consider fitness for work in the context of the Government's Health, Wealth and Wellbeing initiative and its aims to:

- Improve the general health and wellbeing of the working age population
- Support more people with health conditions to stay in work or enter employment

Delegates will acquire the necessary tools to advise and effectively deal with the various categories of sickness absence including:

- Genuine but persistent absences
- Genuine chronic/acute long term sickness
- Fraudulent malingerer
- Lazy malingerer

Occupational health expertise is crucial in dealing with the issue of fitness for work and delegates will benefit from the viewpoint of an occupational health professional and can compare and contrast with the relevant legal issues, including proper implementation of policies and procedures, disability discrimination and reasonable adjustments, with an update of current and relevant case law.

Speaker: **Gillian Howard** is an employment lawyer, running her own practice, specialising primarily in employment law and occupational health. Gillian is an Honorary Fellow of the Faculty of Occupational Medicine, Royal College of Physicians and was on the Editorial Board of *Butterworth's Occupational Health Review*.

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London

21 Jul

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£310 + VAT CLT Members/£495 + VAT Non-members

# HR Skills and Policies for Legal Practitioners

Intermediate | 6 hours CPD

This course provides the managing partner, in-house practitioner or employment solicitor in private practice with an important toolkit as to how to implement employment law advice and workplace policies. So often clients are given advice or directed to take a course of action, but they have little means or knowledge as to how to deal with their employees for the advice to take effect. The course focuses on providing you with the skills and confidence to successfully advise upon the practical implementation of HR advice and provides a comprehensive guide to drafting and implementing HR policies.

Part One: Implementing HR policies

- Recruitment and selection
- Induction
- Policies and procedures
- Performance management and appraisal
- Tackling difficult people issues
- Best practice HR
- How to make policies work to maximise your firm's performance
- The key HR elements

Part Two: Case studies on implementation of legal advice

- Discipline/dismissal for conduct
- Implementing redundancy selection
- Dealing with discrimination, stress and harassment

Speaker: **Sue Hatton** is a human resources consultant and a chartered fellow of the CIPD. Sue has acted as HR consultant to Pickerings Solicitors LLP and their clients since 2002.

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London      10 Feb

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£210 + VAT CLT Members/£450 + VAT Non-members

# Converting Your Practice to Employment Law

Foundation | 6 hours CPD

This one day course provides fee earners who currently practise in other areas of law with a cross-over day into employment law and practice. It is geared to lawyers who want to build up their knowledge in this area. The course assumes no prior knowledge of employment law but is reasonably fast paced to cover the most common elements of practice.

Topics to be covered include:

**Terminating the employment relationship** • Wrongful dismissal • Constructive dismissal • Tribunal practice and procedure • Drafting ET1 and ET3 • The law of compromise - negotiating settlements • Drafting compromise agreements.

**Claims in unfair dismissal and redundancy** • Bringing and defending a claim • Defences • The ACAS Code of Practice • Disciplinary procedures • Compensation • Individual rights on redundancy • Duties to consult • Compensation.

**Discrimination** • Direct discrimination • Harassment • Indirect discrimination • Age and disability discrimination • Reasonable adjustments • Recent statutory developments - the Equality Act - new policies and procedures.

**TUPE 2006** • Identifying a business transfer in disposals and acquisitions of business • The implications of the application of TUPE • The rights of employees dismissed before or after a business transfer to which TUPE applies • Bringing and defending a claim.

Speaker: **Lorna Valcin** is a legal consultant for Compromise Agreements Limited and a regular lecturer for CLT. She was rated as a 'notable practitioner' in Chambers and described as 'easy to get hold of and has a methodical approach to work'.

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London	29 Jan, 20 May
Birmingham	5 May
Manchester	12 May
Leeds	27 May

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£210 + VAT CLT Members/£450 + VAT Non-members

## Certificate in Employment Practice **NEW**

Foundation | 12 hours CPD

This two day workshop follows the lifecycle of employment from recruitment through to termination. Suitable for those with no knowledge or experience it aims to provide a practical understanding of all the key areas listed. Learning is reinforced by using case studies and small group discussions.

Day 1:

- Recruitment issues - the legal and practical considerations
- An overview of discrimination legislation and Equality Act 2010: age, sex, race, religion, disability, and sexual orientation
- Employment status
- Contracts of employment: terms required by law, common terms imposed by employers, variation
- Employment rights including maternity and the new additional paternity rights

Day 2:

- TUPE: a summary of the Transfers of Undertakings Regulations and the employment implications when selling or buying a business
- Managing attendance: a guide on handling absence problems fairly and within the law
- Discipline and grievance: a summary of the legal framework and a practical guide to investigating problems and dealing with them
- Termination of employment: dismissal and redundancy

Speaker: **Rosamonde Quincey**, BA Hons, FCIPD, is an experienced and practical HR consultant and has worked in the area of employment law and performance management for many years. Rosamonde is passionate that employment law should be better understood by employers to enable them to be “on the front foot” when correcting inappropriate behaviours or actions. Her clients include multi-nationals and SMEs and range from public to private sector.

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London

18 - 19 Mar, 23 - 24 Jun

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£495 + VAT CLT Members/£795 + VAT Non-members

# Employment Law 2015 Update

**Hot Topic**  
**Best Seller**

Update | 6 hours CPD

This 'must attend' course will examine the immense activity during the last 12 months; addressing the changes in case law and forthcoming proposed legislation.

Included in this will be an in-depth look at the surprising decision of the EAT regarding what constitutes an establishment for the purposes of collective redundancy consultation in *USDAW vs. Ethel Austin Ltd* and cases on:

- Employment status
- Rolled up holiday pay in light of *Larner* case
- Selection for redundancy
- Retirement issues post *Seldon*
- Reasonable adjustments in disability cases
- Other substantial reason dismissals
- Whistleblowing
- TUPE

Speaker: **Trevor Leuty** has been admitted as a solicitor for just over 40 years and is currently a consultant with Banks Kelly Solicitors Limited. He has developed a niche within the motor industry with a particular emphasis on employment law and practice.

Or **Gordon Menzies** is a barrister at the Chambers of Stephen Hockman QC, 6 Pump Court, Temple, London and acts for both claimants and respondents in all aspects of employment law.

Birmingham	4 Mar	London	25 Mar
Manchester	11 Mar		
Leeds	19 Mar		
Bristol	24 Mar		

£210 + VAT CLT Members/£450 + VAT Non-members

# Discrimination - Practice and Procedure **NEW**

Intermediate | 6 hours CPD

At the end of this course those attending will have received a thorough grounding in the new tribunal rules and how to use them effectively in the complex area of discrimination claims. Many claims fail because the relevant evidence has not been elicited from the parties at an early stage of the litigation process.

The course will cover:

- How to get your claim started, the new fees regime and remission
- Making sure claim/defence is carefully pleaded to ensure you get through the new sift procedure
- Collecting and evaluating the evidence
- Preparing for preliminary hearings
- Drafting witness statements
- Tips for conducting the hearing
- Preparing for remedies hearing, mitigation, evidence of the market place, purpose of schedules and counter schedules

Speaker: **Susan Belgrave** has years of experience in the employment tribunals and higher courts. She has appeared in a number of high profile discrimination claims and is sought out by claimants and employers alike in this difficult area.

London	30 Jun
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£210 + VAT CLT Members/£450 + VAT Non-members



## Employment Contracts from Hiring to Firing

Intermediate | 6 hours CPD

This course provides a comprehensive guide to negotiating and drafting employment contracts for people who work including employees, directors and agency staff.

It will take you from the initial negotiations, at the start of the contract, through to the more delicate discussions required to bring a contract to its close.

Within this there will be a practical exercise for negotiating and drafting. It will look at:

- The standard employment contract
- Agency workers
- Consultants and service providers
- Directors' service agreements
- Tricky variants
- Remuneration structures
- The decision to let them go
- How to present the compromise agreement
- Negotiating the tricky departures
- Swift exit strategies
- Checking the compromise agreement for 'holes'

Speaker: **Meg Pennycook** qualified as a barrister in 1992, and during the last 20 years she has practised employment law in both the public and private sectors. She now works as an employment law consultant advising on non-contentious and contentious employment issues. Meg has an in-depth knowledge of a wide number of areas within the field of employment law.

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Manchester	9 Jun
London	16 Jun

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£210 + VAT CLT Members/£450 + VAT Non-members

## Overview of Digital and Social Media Law **NEW**

Intermediate | 6 hours CPD

Digital media is not just maintaining a corporate website or even making products and services available but also setting up blogs, participating in forums and using Twitter, Facebook, LinkedIn and other sites.

This course gives an introduction and overview of the legal risks associated with all elements of digital and social media. It will be of interest to all commercial and corporate practitioners who do not deal with digital and social media law on a regular basis but need to have a working knowledge of it. It will also be useful to those joining the relevant department dealing with digital and social media law either in private practice or in-house.

It includes:

- Overview of social and digital media and key terminology
- Identifying key areas of risk with social and digital media:
  - Operational risks
  - IP and online infringement
  - Privacy and confidentiality
  - Data protection
  - Defamation
  - Other content liability issues

Speaker: **Sherree Westell** is a solicitor with over 20 years' commercial law experience with particular expertise in IT, digital and social media as well as IP. She now works as a consultant for Belgravia law firm, Woodroffes, on a range of IT, digital and social media projects.

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London	4 Mar
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£210 + VAT CLT Members/£450 + VAT Non-members

# Compromise/Settlement Agreements in Employment Law

Intermediate | 3 hours CPD

Compromise agreements have been renamed settlement agreements and the law on pretermination discussions is now in force. ACAS have published a Code of Practice and guidance notes on settlement agreements.

This course includes a practical exercise and will examine:

- The new legislation and the ACAS code and guidance notes
- Negotiating the deal
- Drafting settlement agreements
- ACAS and conciliation
- General release clauses
- Repayment, conditional payment and liquidated damages clauses
- The effect of misrepresentations
- Imposing fresh restrictive covenants
- Compromising contractual claims
- Tax issues

Speaker: **Trevor Leuty** has been admitted as a solicitor for just over 40 years and is currently a consultant with Banks Kelly Solicitors Limited. He has developed a niche within the motor industry with a particular emphasis on employment law and practice.

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London	12 May am
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£140 + VAT CLT Members/£300 + VAT Non-members

# Employment Law in the Context of Advising Schools

Intermediate | 3 hours CPD

This specialist course is aimed at employment lawyers and HR professionals who work with education providers. With a practical focus, this course enables you to consider issues specific to the education sector.

It will cover:

- The Burgundy Book: pitfalls for the unwary
- Continuity of employment for teachers
- Pension rights and obligations: possible problems
- Safeguarding issues
- Head teachers' own pay
- How far can an Ofsted report be used as ammunition against an individual teacher?
- Retirement
- Rights (or not) to legal representation in disciplinary proceedings
- Duty of care of the employer

Speaker: **Oliver Hyams** is a barrister at Devereux Chambers. He is a specialist in two areas: employment and education law.

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Manchester	14 May pm
London	15 May pm

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£140 + VAT CLT Members/£300 + VAT Non-members

**Best  
Seller**



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Some recent bespoke courses we have developed for our clients are as follows:

**Negotiation for Employment Lawyers | Contracts of Employment: Case Tracking and Precedent Review | TUPE Update**

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# Employment Tribunal Advocacy Workshop

Intermediate | 6 hours CPD

Do you want to enhance your skills when presenting a case in the employment tribunal?

This popular course concentrates on effective presentation and persuasive advocacy in the full merits hearing. It is based on tailor-made case studies and realistic practical exercises, with delegate performance and personal feedback as a central element. The afternoon is devoted to a mock tribunal hearing.

By the end of the day, you will have covered:

- Examination-in-chief: how to present your own witnesses effectively
- Cross-examination: challenging your opponent's witnesses
- Reexamination: when and how to do it
- Useful tools: preparing and using skeletons, chronologies, written submissions, schedules and counter schedules of loss
- Persuasive closing arguments

Speaker: **John Sprack** has 14 years' experience as an Employment Judge. He is an experienced CPD trainer. He was formerly Reader at City Law School where he taught employment law and advocacy for 11 years on the Bar course. He is the author of a number of employment law publications.

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**London**      **6 Feb, 9 Jun**

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£210 + VAT CLT Members/£450 + VAT Non-members

# Solving TUPE Problems in 2015

Intermediate | 5 hours CPD

This 5 hour course examines common issues which arise before, during and after a transaction to which the TUPE Regulations apply and how to deal with them.

There will be a detailed look at recent case law including Tapere vs South London Maudsley NHS Trust, Hynd vs Armstrong, Dynamex Friction Ltd vs Amicus and Nationwide Building Society vs Benn and recent government proposals to amend the Regulations.

The course will include:

- The basic rules - when is a dismissal connected with the transfer? Whose reason is relevant? Who is employed "immediately before the transfer"?
- Reducing staff
- Changing terms and conditions of employment following a TUPE transfer.
- Can I amend the terms and conditions? Employee co-operation- what are the options?
- Whose ETO reason is relevant? Are unfair dismissals a nullity?
- Which employer is responsible?
- Compromise Agreements. Can a potential TUPE claim be compromised?

Speaker: **Trevor Leuty** has been admitted as a solicitor for just over 40 years and is currently a consultant with Banks Kelly Solicitors Limited. He has developed a niche within the motor industry with a particular emphasis on employment law and practice.

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**Manchester**      **14 Apr**  
**Birmingham**      **15 Apr**  
**London**      **22 Apr**

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# Live Webinars

Visit [www.clt.co.uk/webinars](http://www.clt.co.uk/webinars) to see our extensive programme.

## Striking Out and Deposit Orders in the Employment Tribunal

The 2013 rules have not changed the wording relating to striking out and deposit orders, save that a deposit may be ordered in connection with parts of a claim.

Practitioners are warned not to pursue an apparently attractive option when it would be an unnecessary expense and burden on Tribunal time (see *HH Judge Serota QC in Qdos Consulting Ltd & Others v Swanson*).

Speaker: **Trevor Leuty** has been admitted as a solicitor for just over 40 years and is currently a consultant with Banks Kelly Solicitors Limited. He has developed a niche within the motor industry with a particular emphasis on employment law and practice.

5 Mar | 1.00pm - 2.30pm

## The Reverse Burden of Proof in Discrimination Claims

In *Dresdner Kleinwort Wasserstein Ltd v Adebayo Cox J* referred to the "insidious nature of discrimination." It was for that reason that the Courts introduced the concept of the reverse burden of proof. This is now given statutory effect in s136 Equality Act 2010. The Court of Appeal have said that the same principles apply in a whistleblowing case.

Speaker: **Trevor Leuty** has been admitted as a solicitor for just over 40 years and is currently a consultant with Banks Kelly Solicitors Limited. He has developed a niche within the motor industry with a particular emphasis on employment law and practice.

5 Mar | 10.00am - 11.30am



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## **Appeals to the Employment Appeals Tribunal and Court of Appeal**

Speaker: Michael Salter

## **Appraisal Skills for Senior Lawyers**

Speaker: Elizabeth McManus

## **Coronial Reform: What You Need to Know**

Speaker: Lucy Wilton

## **Costs in the Employment Tribunal**

Speaker: Michael Salter

## **Disclosure in the Employment Tribunal**

Speaker: Michael Salter

## **Employment Status - The Shifting Scene**

Speaker: John Sprack

## **Misconduct Dismissals – Fair or Not?**

Speaker: John Sprack

## **Mounting a Defence in the Employment Tribunal**

Speaker: Michael Salter

## **Personality Conflicts**

Speaker: Gordon Menzies

## **Running an Employment Tribunal Claim**

Speaker: Michael Salter

## **Settlement and Compromising claims**

Speaker: Michael Salter

## **Whistleblowing**

Speaker: Michael Salter

## **Zero Hours Contracts**

Speaker: Catherine Wilson

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<b>4</b>	<b>£225</b>	<b>£450</b>
<b>10</b>	<b>£375</b>	<b>£750</b>
<b>20</b>	<b>£599</b>	<b>£1199</b>

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*Your* CPD Training Guide  
January 2015 Onwards

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### Financial Remedy Strategies: Your Ultimate Road Map **NEW**

Advanced | 5 hours CPD

The case is over, the final order is drafted and you're on to the next task, but learning from outcomes can help you to develop your tactics and strategy for future cases.

This interactive workshop for more experienced practitioners deconstructs the preparation of a contested financial remedy case. Using a detailed case study, the workshop starts at the end of proceedings and traces the process backwards. Delegates will consider whether the case could have been handled differently and whether other case management directions could have been sought to achieve a different outcome.

What you will learn:

- Which documents are required for effective preparation of contested final hearing
- How to manage client expectation on outcomes
- Tips for drafting
- Best practice from final hearing to FDR: agreeing trial bundles, offers to settle
- How to be pro-active after FDR
- Preparation and advocacy points for FDA and FDR
- Reviewing financial information after exchange of Form E
- Timing tactics: when to make your application.

This course is ideal for:

Partners | Associates | Lawyers with experience of family finance work seeking to take their practice to the next level.

Speaker: **Mena Ruparel** MCI Arb is an experienced family law solicitor and consultant with Shedden Family Law. She is also a trainer and arbitrator, a member of the Chartered Institute of Arbitrators and a Resolution accredited specialist in matrimonial finance advocacy.

Leeds	28 Apr	Birmingham	2 Jun
London	5 May		
Newcastle	15 May		
Southampton	28 May		

£210 + VAT CLT Members/£450 + VAT Non-members

### The Average Money Divorce: The Junior Lawyer's Guide to Success **NEW**

Foundation | 5 hours CPD

The 'average money' case – middle income and modest capital – poses particular challenges to the family lawyer. What counts as 'average' may vary, but the fundamental issue is that there isn't enough money to go around easily. Nevertheless, it is often more junior lawyers who deal with the management of these cases.

This workshop takes you through the whole process of dealing with a financial remedy case from the preparation of the Form E, analysis of the 'usual' financial disclosure, through to preparing the negotiation correspondence to settle the case and avoid a final hearing.

What you will learn:

- How to fund the average case post LASPO
- Dispute Resolution options – how and when to use voluntary disclosure, mediation, collaborative law and arbitration
- How to manage the client's expectations from first instruction onwards
- How to apply Section 25 Matrimonial Causes Act criteria
- How to analyse financial disclosure
- How to identify and narrow issues prior to the First Directions Appointment
- Instructing experts; property and pension valuations
- Approaches for dealing with pensions and maintenance
- Negotiation handling

This course is designed for:

Lawyers in their first few years of practice | Paralegals | Trainees | Legal Executives

Speaker: **Mena Ruparel**, *see left*.

Birmingham	11 Mar
London	27 Apr
Manchester	8 May
Newcastle	8 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

Pensions on Divorce for  
Family Lawyers: The Next Level **NEW**

Advanced | 3 hours CPD

Taking pensions knowledge to the next level for more experienced family lawyers.

Pensions are a significant financial asset and one of the more complex issues that family lawyers have to deal with. You will know the fundamentals and may deal with pensions regularly; this half day course will give more experienced practitioners the chance to look in more detail at how pensions should be treated in divorce proceedings from start to finish.

Topics to be covered include:

- A practical approach to pensions on divorce, looking at first steps in approaching the pensions issue, interpreting pension information, when to take actuarial advice, what to do if your client won't take advice, practical approaches to offsetting and apportionment for period of marriage
- Uniformed Services (police, armed forces and firefighters) – special features
- Current issues including changes to the public sector schemes, state pension scheme proposals and Lifetime Allowance, tax charges and pension sharing

Speaker: **Kate Routledge** (BSc Hons FIA) is a qualified actuary with over 25 years' experience in the pensions industry. She is a consultant actuary at Collins Actuaries specialising in the treatment of pensions in divorce cases and has provided over 500 expert witness reports for use in divorce proceedings.

London 13 May pm

£140 + VAT CLT Members/£300 + VAT Non-members

Introduction to Pensions  
on Divorce for Family Lawyers **NEW**

Foundation | 3 hours CPD

Pensions can be a significant financial asset in divorce proceedings; in a surprising number of cases they can be the largest financial asset. However, pensions are complicated and may often not be taken into account properly in divorce cases, risking one party being unfairly treated.

This half day course will give an overview of the different types of pension and how they can (and should) be treated in divorce proceedings.

What you will learn:

- Introduction to Pensions - Why a Pension Scheme? - Features of different types of pension: Private Sector Defined Benefit, Public Sector Defined Benefit, Defined Contribution, State Pension Scheme
- Valuation of Pension Rights - Cash Equivalents – Are they correct to use for divorce? - Alternative Valuations – when to use an alternative to the Cash Equivalent
- Methods of Settlement - Offsetting, Pension Sharing Orders, Attachment Orders
- Consulting an expert: when to consult and how to instruct an expert
- Case studies: worked examples including Police Pension Scheme, 'Equality' via a Pension Sharing Settlement – which pension to share?

An essential briefing for family lawyers in their first few years of practice.

Speaker: **Kate Routledge** (BSc Hons FIA) is a qualified actuary with over 25 years' experience in the pensions industry. She is a consultant actuary at Collins Actuaries specialising in the treatment of pensions in divorce cases and has provided over 500 expert witness reports for use in divorce proceedings.

London 22 Apr pm  
Birmingham 3 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

### Effective Drafting in Matrimonial Finance

Foundation | 6 hours CPD

It has never been more important for you, as a busy matrimonial practitioner, to draft documents effectively to ensure the most positive outcome for your client.

The focus of this practical and interactive course will be on effective drafting in Matrimonial Finance proceedings.

This course will incorporate:

- Pleading your client's case by effective completion of the Form E
- Drafting the statement of issues and questionnaires
- Financial schedules and summaries
- Effective drafting of answers to questionnaires
- Offer letters – open and without prejudice
- Instruction of experts
- Skeleton arguments
- Consent orders/heads of agreements, effective drafting with an eye on enforcement
- Preparation for the final hearing, drafting the index to the trial bundle
- Narrative statements – s.25 MCA 1973

Speaker: **Mena Ruparel** MCI Arb is an experienced family law solicitor and consultant with Shedden Family Law. She is also a trainer and arbitrator, a member of the Chartered Institute of Arbitrators and a Resolution accredited specialist in matrimonial finance advocacy.

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<b>Birmingham</b>	<b>22 Apr</b>
<b>Newcastle</b>	<b>29 Apr</b>
<b>Leeds</b>	<b>11 May</b>
<b>London</b>	<b>12 May</b>

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£210 + VAT CLT Members/£450 + VAT Non-members

### Advocacy in Matrimonial Finance

Intermediate | 6 hours CPD

This course is designed to teach you how to approach advocacy in matrimonial finance proceedings.

It is a practical course to introduce and hone the advocacy skills you will require before a district judge. Matrimonial finance proceedings require different advocacy and negotiation skills to other areas of family law and you will learn these during the day in a series of practical case studies.

The course is fully interactive each delegate will be expected to present part of the case for either husband or wife.

The course covers advocacy for:

- First Directions appointment – how to make/respond to objections to questions asked or documents requested
- Financial Dispute Resolution – negotiations and putting your case to the district judge
- Maintenance pending suit applications – how to present the case for either the husband or the wife
- The Final Hearing – preparation of documents, trial bundle, opening speeches, examination in chief, cross examination, final submissions, dealing with the law

This course will be limited to 20 delegates to allow for full participation.

Speaker: **Mena Ruparel** MCI Arb is an experienced family law solicitor and consultant with Shedden Family Law. She is also a trainer and arbitrator, a member of the Chartered Institute of Arbitrators and a Resolution accredited specialist in matrimonial finance advocacy.

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<b>Manchester</b>	<b>23 Feb</b>
<b>London</b>	<b>24 Feb, 15 Jun</b>
<b>Leeds</b>	<b>14 May</b>
<b>Birmingham</b>	<b>9 Jun</b>

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£210 + VAT CLT Members/£450 + VAT Non-members

## Tricky Issues in Matrimonial Finance

Workshop | 6 hours CPD

This workshop is designed to help the practitioner think about every day challenges by using a number of discussions and case studies

### ADR options: group discussion

- Mediation, Collaborative law, Family Law Arbitration • Round table meetings
- Voluntary disclosure

### Periodical Payments;

- MPS • Joint lives or time-limited • Quantum

### Negotiating settlement

- Drafting Letters • Without prejudice open correspondence? • Different styles of negotiation • Negotiating at FDA and FDR

### Costs

- Part 28 FPR2010 • Costs applications • A practical “how to” study of making and succeeding in these applications

Speaker: **Mena Ruparel** MCI Arb is an experienced family law solicitor and consultant with Shedden Family Law. She is also a trainer and arbitrator, a member of the Chartered Institute of Arbitrators and a Resolution accredited specialist in matrimonial finance advocacy.

London	20 Apr	Southampton	29 Jun
Manchester	30 Apr		
Newcastle	13 May		
Birmingham	18 May		

£210 + VAT CLT Members/£450 + VAT Non-members

## Matrimonial Finance Update

Update | 3 hours CPD

As a busy family practitioner you have never needed more assistance in keeping up to date with developments in finance cases. This course is constantly revised to provide a comprehensive review of the last 18 months covering a wide range of topics and case law review.

The course includes the consideration of case law, developments and practice in the following areas:

- Pre and post nuptial agreements
- The treatment of pre marriage and post separation assets
- Inherited wealth
- Periodical payments including the thorny issue of the effect of cohabitation on term and quantum
- Overturning final orders
- Pensions
- New costs rules cases
- An eye on bankruptcy in the recession
- Cases decided following the decision in *Prest vs. Petrodel*
- The impact of the case of *S vs. S* [2013] EWHC 7 on the use of Arbitration in family cases
- The impact of the new Family Procedure Rules will be considered throughout the course

Speaker: **Mena Ruparel** MCI Arb is an experienced family law solicitor and consultant with Shedden Family Law. She is also a trainer and arbitrator, a member of the Chartered Institute of Arbitrators and a Resolution accredited specialist in matrimonial finance advocacy.

Birmingham	16 Mar pm	Leeds	1 Jun am
Newcastle	30 Mar am	Bristol	16 Jun pm
London	31 Mar pm, 22 Jun pm		
Southampton	6 May pm		

£140 + VAT CLT Members/£300 + VAT Non-members

# Unmarried Couples, Separation and Property: Essential Practice and Procedure

Intermediate | 5 hours CPD

The number of couples living together continues to increase and the law on property issues remains complex. Clients want good advice to assess whether they have a claim and how much it may be worth, as the costs and risks of litigation can be high. This in-depth look at the law and practice will give you the confidence you need to advise your clients, covering:

- Ownership of the home including conveyancing and other practical aspects
- Express, resulting and constructive trusts and proprietary estoppel
- The implications of *Stack vs. Dowden* and *Jones vs. Kernott*
- The quantification of beneficial ownership
- Equitable accounting
- Preparing a case
- Taking initial instructions and initial advice
- The forensic exercise and documentary trail
- Commencing proceedings and drafting the pleadings
- Case stages and case management under the CPR
- The importance of offers to settle and Part 36
- Preparing for and the conduct of the trial
- Ownership of personal property
- Applications under Sch 1 of the Children Act 1989
- Living Together Agreements

Speaker: **Stephen Parker** LLB, MCI Arb is head of child care at Greens LLP, a deputy district judge, family law arbitrator and civil high court advocate.

London	18 Mar
Manchester	23 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

# Obtaining and Enforcing Disclosure in Financial Remedy Proceedings

**Hot  
Topic**

Intermediate | 6 hours CPD

This course examines strategies for securing disclosure and financial relief against a reluctant party in family finance cases. It will consider how far one can go in identifying and pursuing assets where there is an attempt to conceal them or divert them elsewhere.

The course will focus on:

- Obtaining disclosure and the potential penalties for non-compliance
- Dealing with objections to disclosure
- Compelling disclosure including the difficulties presented by *Imerman*
- Third party disclosure
- Piercing the corporate veil – is this actually possible?
- Tactics and mechanisms for preserving assets
- Dissipation of assets including section 37 and other applications
- Assets transferred to 3rd parties or held by 3rd parties
- The Proceeds of Crime Act 2002 in financial remedy proceedings
- Bankruptcy in financial remedy proceedings

Speaker: **Stephen Parker** LLB, MCI Arb is head of child care at Greens LLP, a deputy district judge, family law arbitrator and civil high court advocate.



**Speaker very able and engaging**



London	30 Apr
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£210 + VAT CLT Members/£450 + VAT Non-members



# Understanding the Taxation of Trusts

Intermediate | 3 hours CPD

This course is aimed at private client practitioners who have only tackled estate administration and accounts and wish to develop their knowledge. It deals with clear and practical explanations of the whole range of taxes: income tax, capital gains tax and inheritance tax.

Topics to be covered include:

- Income tax and capital gains tax
  - Liabilities of trustees and beneficiaries with a focus on life interest versus discretionary trusts
  - The treatment of dividend income
  - The special problems arising from settlor interested trusts
  - Now that trusts are taxed at 28%, when does the CGT charge arise and can it be avoided?
  - Actual and deemed gains
  - The availability of holdover, entrepreneurs' and principal private residence reliefs
  - The ways in which liability can be minimised or avoided
- Inheritance tax
  - Entry, periodic and exit charges
  - Use of pilot trusts and multiple trusts
  - Planning issues

Speaker: **Nick Shaw** MA (Cantab), TEP is a consultant with the trust and tax team at Addleshaw Goddard.

London	16 Apr pm
Birmingham	23 Apr pm

£140 + VAT CLT Members/£300 + VAT Non-members

# Residential Property: An Intensive Introduction for Qualified Practitioners Hot Topic

Foundation | 6 hours CPD

This intensive and practical course is aimed at those qualified practitioners looking to change practice areas (for example, due to legal aid cuts) or for those returning after a career break. No prior knowledge of conveyancing (residential or otherwise) is required!

The course will provide a practical overview of residential conveyancing and the pitfalls which may occur on a daily basis in today's market including:

- An overview of the conveyancing transaction
- Identifying your client and the source of funds – why this is your responsibility
- Review of searches available in the market – online or paper based?
- Conveyancing Quality Scheme – what is it all about?
- The Protocol and the new forms
- Key risk areas – CML and your duty to the lenders
- What is SDLT? How does it differ from Stamp Duty?
- Standard Conditions of Sale (5th edition)
- Changes in Land Registry practice – where did office copies go?

The course is supported by clear flowcharts of the residential conveyancing process.

Speaker: **Lorraine Richardson** MA (Cantab), Solicitor, specialises in residential conveyancing and wills and probate in a practice in Suffolk. She is a co-editor of the Law Society publication, *Conveyancing Forms and Procedures*.

Birmingham	23 Feb
London	16 Feb
London	8 Jun
Manchester	15 Jun

£210 + VAT CLT Members/£450+ VAT Non-members

## Interviewing Witnesses: How to Unlock Their Memories

Intermediate | 6 hours CPD

Cognitive interviewing is a tool which can be employed by all litigators to maximise a client or witness's recollection of events. It uses a series of memory retrieval techniques to increase the amount of information that can be obtained from a witness or client. Cognitive interviewing is much more effective than simply asking questions, which interrupts the witness and restricts the natural flow of information.

This practical course, which is suitable for all litigators, trains you to use cognitive interviewing, which is successfully used in some of the largest UK law firms. Using cognitive interviewing will increase the completeness and accuracy of what your witnesses can remember, helping them to remember clearly things that happened many months, or even many years ago. It will also enable you to:

- Assess litigation risks and make decisions about a case
- Prepare cases and take statements based on the full facts
- Obtain up to 40% more relevant information
- Obtain uncontaminated evidence from witnesses
- Obtain more facts and details from witnesses first time, reducing the need for costly re-interviews

Speaker: **Dave Barney** specialises in training lawyers in interviewing and investigating techniques. He has trained over 3000 lawyers in the last 15 years and has worked with all of the top 10 UK law firms.

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London 12 Mar, 18 Sep

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£210 + VAT CLT Members/£450 + VAT Non-members

## Family Law 2015 Update

Update | 6 hours CPD

This popular course will provide you, as a busy family practitioner, with a comprehensive update on all aspects of family case law over the last 18 months.

The essential topics covered during the day include:

**Divorce** • Jurisdictional and validity issues.

**Matrimonial Finance** • Cases since *Radmacher* • The treatment of non-matrimonial assets • Periodical payments – recent developments • Costs.

**Private Children Law** • Parental Responsibility/Parental Orders • Child Arrangements Programme • The demise of Residence and Contact Orders • Domestic abuse and intractable problems • PSO, SIO, SGO, section 91(14), section 10(9) • Removal from the jurisdiction.

**Cohabitation** • Who owns the house? – *Kernott and Jones* and cases thereafter • Schedule 1 Children Act applications.

**Domestic Violence** • Occupation Orders.

**Public Children Law** • Children and Families Act and the new PLO • Fact-finding developments • Threshold and joint perpetrators • Expert evidence • Sexual abuse • Assessment update • Costs and funding.

**Adoption and Placement Orders** • Practice and Procedure • Protection of confidential information • Instruction of Experts in Children Act cases • Child witnesses • Appeals • All the latest Practice Directions.

Speaker: **Stephen Parker** LLB, MCI Arb is head of child care at Greens LLP, a deputy district judge, family law arbitrator and civil high court advocate.

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Birmingham	16 Jan	Southampton	17 Mar
London	11 Feb, 2 Jul	Derby	7 May
Leeds	20 Feb	Manchester	2 Jun
Newcastle	25 Feb		

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£210 + VAT CLT Members/£450 + VAT Non-members

# Certificate in Family Law and Procedure

Foundation | 12 hours CPD

An intensive two-day course designed to give you a thorough grounding in family law for those wishing to specialise in this area of work. Whether you are returning to practice, transferring to family law, a newly qualified fee earner or a trainee you will find this two day event packed with information and practical tips.

Day one gives you an overview of both private and public law children work, fully updated to take account of the changes brought in by the foundation of the Family Court and the Children and Families Act, with reference to relevant leading cases. Day two focuses on divorce, financial applications on divorce and separation and related issues.

What you will learn:

## Day One – Children

Private law – resolving disputes between parents

- Parental responsibility
- Child Arrangements Orders and the Child Arrangements Programme
- Change of Surname and other disputes
- Procedure, gatekeeping and allocation and hearings
- Funding issues

## Public law – children and local authorities

- Emergency protection and EPOs and ICOs
- Applications for assessments
- Pre-proceedings work
- Care and supervision orders
- Court procedure and hearings
- Children and Families Act and the PLO
- The 26 week time limit and exceptions
- Use of experts

## Day Two – Divorce and finance

- Divorce
- The role of mediation; compulsory MIAMS and other dispute resolution options
- Financial orders after divorce and civil partnership dissolution
- Procedures, documents and hearings
- Section 25 and the discretion of the court
- Periodical payments and capitalisation
- Pensions and their treatment
- Costs
- Cohabitation and property rights
- Property rights
- The Trusts of Land and Appointment of Trustees Act 1996

Speakers: **Stephen Parker** LLB, MCI Arb is head of child care at Greens LLP, a deputy district judge, family law arbitrator and civil high court advocate and **Mena Ruparel** MCI Arb is an experienced family law solicitor and consultant with Shedden Family Law. She is also a trainer and arbitrator, a member of the Chartered Institute of Arbitrators and a Resolution accredited specialist in matrimonial finance advocacy.

<b>Birmingham</b>	<b>6 - 7 Oct, 20 - 21 Apr</b>
<b>Leeds</b>	<b>8 - 9 Dec</b>
<b>London</b>	<b>2 - 3 Feb, 18 - 19 May</b>

£495 + VAT CLT Members/£795 + VAT Non-members

### Assertiveness Skills

Foundation | 5 hours CPD

This course enables you to improve your assertiveness skills enabling you to ask for what you want and manage expectation using constructive communication skills.

Maybe you face the challenge of having to speak up for your views more in tough situations or with challenging people. Maybe you know that you can become aggressive under pressure. In either case, you know you want to have the power to communicate more effectively and achieve better outcomes. This is the course for you. Practical and pacy, it will enable you to work out new strategies and improve your impact on people and on situations.

Topics covered include:

- Shaping events - asking for what you want
- How to say what you mean
- Managing expectations
- Constructive communication principles
- Becoming more assertive - confidence building
- Defusing aggression in self and others
- Building personal credibility
- Assertiveness, power and influence
- Managing conflict assertively
- Use of challenging and probing

Speaker: **Elizabeth McManus**, MA, Grad IPD, is a founding partner of Development Alternatives – a professional training and management consultancy – and a former personnel and training manager with Addleshaws.

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London      23 Apr

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£210 + VAT CLT Members/£450 + VAT Non-members

### Business Development for Lawyers

Foundation | 6 hours CPD

This course will equip lawyers with a range of strategic marketing, tactical business development and selling skills and activities which they should undertake whether working with commercial or private clients.

The course starts by considering the context of changes in the market and strategic firm-wide issues, considers the various traditional and online promotional marketing tools available and progresses onto selling to new clients and developing more business from existing clients and referrers.

#### Get ready

• Set goals • Consider your firm and departmental context • Analyse your referrers, clients and work • Discover new client needs and develop new services • Select the right strategy • Develop a niche practice.

#### Take action

• Identify targets using research • Raise your profile • Use social media to listen to the market and make connections • Generate enquiries and leads.

#### Produce results

• Learn selling skills • Manage client and contact information • Pitch effectively for new clients and work • Convert enquiries into clients • Develop action plans • Monitor progress and results.

Speaker: **Kim Tasso**, BA, DipM, MBA, is an independent strategic marketing consultant, specialising in the professional services sector, with over 30 years' experience including a senior business development role at Nabarro Solicitors.

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London      24 Jun

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£210 + VAT CLT Members/£450 + VAT Non-members

## Developing and Implementing Effective Client Care Practices

Intermediate | 6 hours CPD

The course will provide you with an understanding of why client care is essential to running a successful firm.

It also provides a practical framework for setting up and implementing a working client care system, and to develop the skills needed to communicate effectively with clients in order to underpin and develop client relationships.

Topics covered include:

- Why client care is important • Marketing quality - branding and kite marks
- The PCC core principles and Chapter 1 • Benchmarking service excellence
- Client profiling • Analysing current client care practice • Developing a client care plan • Delivering a quality service - CRM systems, SLAs and other key issues • Clients as stakeholders • Communicating with clients - the how and when • Holding conversations and influencing skills • Managing expectations • Dealing with difficult interactions - handling complaints and criticism • Ensuring win:win outcomes.

Speaker: **Martin Richardson** is a lawyer who began his career as a legal academic before moving to the City and the former Berwin Leighton to set up and run the firm's first professional development programme.

London 13 May

£210 + VAT CLT Members/£450 + VAT Non-members

## Getting the Very Most Out of Your Day

Intermediate | 5 hours CPD

The key to making the most of your time is planning and then protecting your plan. People who say that they have no time do neither plan nor protect.

If you plan what to do and when, and then stick to it, then you will have time. For people who have demands placed on them by others, particularly other departments, managers, and clients, you are obliged to diplomatically manage the expectations of others.

Getting the most from your day is chiefly about conditioning your environment, rather than allowing your environment to condition you. If you tolerate, and accept without question, the interruptions and demands of others then you create your own time management problems.

Objectives:

- To understand a seven stage process for managing your time • To become aware of where your time is being spent • To be aware of where your time should be spent • To take away some key hints and tips for immediate application • Current use of time • Time comparisons • Time wreckers • Prioritising tasks • Improving your efficiency • Delegation • Assertiveness • Review.

Speaker: **John Ranson** has a vast range of experience in management training from many sectors and delivers enjoyable, practical training focused on providing solutions for day to day business issues.

“ Title of the course says it all - well presented and very helpful ”

London 16 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

# Managing and Motivating People

Intermediate | 6 hours CPD

Designed for staff with responsibilities within a legal environment (or for those about to undertake them), this course provides an overview of the key issues to be understood to manage people well in a rapidly changing environment.

For law firms, people are the most important and most costly investment made. It is therefore vitally important that all 'people managers' understand a range of tactics and methods to ensure that the firm not only maximises its return on the investment but also creates a culture within which staff are happy and want to play their part in achieving the firm's goals.

This practical and interactive course takes the fear out of managing people and explores the following key areas:

- What is different about law firms?
- Common goals, values and standards
- Motivating people
- Leadership and teams effective delegation coaching and development
- Performance management and 'difficult' people
- Managing change

Speaker: **Keith Harper** is Managing Director of Harper Professional, and is a management consultant and trainer who works solely with law firms. He has 15 years' experience of successfully advising and training a wide range of clients from global businesses to small partnerships. From previous senior roles in industry, and the professional services sector, Keith has gained a wealth of experience of management issues, and specifically of the role of management within the legal environment.

London	19 May
Manchester	21 May

£210 + VAT CLT Members/£450 + VAT Non-members

## Legal Aid Supervision: An Introduction

Hot  
Topic

Foundation | 7 hours CPD

This course is specifically designed for supervisors under the SQM and legal aid contracts. Aimed at those taking on the role of legal aid supervisor or deputy for the first time, it will cover:

- Meeting the generic requirements for supervisor status on page 1 of the LAA Supervisor Form
- New supervision requirements in the 2013 legal aid contract
- SQM 2013 and Lexcel 5 requirements for supervision and file review
- Practical supervision: day to day techniques for better file compliance
- Hints and tips for dealing with legal aid audits
- Building relationships and credibility
- Time management.

Outcomes focused regulation makes the effective running of the firm a matter of professional conduct. It requires effective systems for supervision, risk management and delegation, and expects training to ensure the competence of all personnel in performing their duties.

This course will help you meet this requirement.

Speakers: **Vicky Ling** BSc MPhil is a specialist legal aid consultant, member of the Low Commission and formerly managed a CAB, a law centre and a housing advice centre, as well as implementing the then Legal Aid Board's quality assurance standard and **Matthew Moore** is the Director of Consultancy Services with Infolegal Ltd – specialist compliance and practice management advisers to the legal profession – and is also a consultant solicitor with the regulatory specialists Jayne Willetts & Co.

London	18 Feb
Bristol	4 Feb
Manchester	11 Feb
Leeds	25 Feb

£210 + VAT CLT Members/£450 + VAT Non-members

## Adoption and Fostering: New Developments and the Law

**Hot  
Topic**

Intermediate | 3 hours CPD

Get to grips with the shifting landscape in adoption, fostering and contact.

Adoption and fostering law and procedure are undergoing rapid changes. This course will give those who act for parents, children and local authorities a full update covering key topics which include:

- Fostering for adoption – the concept, the law and what it means for birth parents, adopters and children
- Concurrent planning – how it works, best practice issues and the legal pitfalls
- The adoption process – understand the rapidly changing process; from assessment to order
- Contact and adoption – a thorough understanding of the law surrounding contact pre- and post-adoption
- Analysis of the important cases on key adoption issues

Speaker: **Jane Lakin** LLB, LLM, Solicitor. Jane has extensive experience as a local authority principal solicitor, regularly providing legal advice to Adoption and Permanence Panels and undertaking complex adoption and care cases. She has also acted in private practice. She holds an LLM in Child Law and is a member of BAAF, Legal Group Advisory Committee.

London	8 Jun
Birmingham	15 Jun
Newcastle	22 Jun

£140 + VAT CLT Members/£300 + VAT Non-members

## Care and Adoption Workshop

Intermediate | 6 hours CPD

This course looks at six particular problem areas in care and placement for adoption cases from the point of view of practitioners acting for parents, local authorities and children within the radically changing landscape for child care lawyers.

You will take away a knowledge of the following:

1. How is the 26 week timescale to be achieved? - Better use of the pre-proceedings process - First hearings and C.M.C's - Extensions and exceptionality
- The use of sanctions - Care plans, choate or otherwise - Last-minute placement order applications.
2. The use of experts - When is an expert really necessary? - Who is now to do risk assessments? - Hourly rates, hours, interim payments and prior authority - Practice direction applications, 'by the book'
3. Parties with learning difficulties - When and how to organise assessment - Assessment by local authority workers - When is a learning difficulty a threshold issue? - Working for the official solicitor.
4. Contact after the Placement Order - Why so few applications? - Hard to place children and the dearth of adopters - Are we raising unrealistic expectations in parents? - Post adoption contact, Facebook, and the 'unreasonableness' test.
5. Adoption by foster carers - The new regime and recent case law - The injunction remedy - The opportunities for direct contact to continue.
6. Pools of perpetrators - Is there a major problem with SB? - Post - SB case law - Historical fact finding and proportionality.

Speaker: **Graham Pegg** LLB, Solicitor, is an Independent Trainer and Consultant with Pickerings Solicitors. Graham has been a member of the Law Society's Children's Panel since its inception and is a specialist in Children Law.

Manchester	13 Mar
London	19 Mar
Birmingham	13 May
Leeds	21 May

£210 + VAT CLT Members/£450 + VAT Non-members

# 16

## Children Panel Approved 3 Day Course

Intermediate | 18 hours CPD

This Law Society approved course is for qualified solicitors and FILEX wishing to represent any party in public law proceedings whether children, adults or local authorities and who wish to apply for membership of the Law Society's Children Law Accreditation Scheme (formerly the Children Panel).

The course is intermediate level and is skills based; you will have appropriate knowledge and experience in public and private law proceedings as required by the accreditation criteria. You will then have six months from completing this course to apply for membership of the panel and you need to meet the appropriate criteria at the date of making your application for accreditation.

The course encourages active participation and discussion throughout.

You will learn:

- Child development – assessing competence of children
- Attachment – good enough parenting
- Indicators of significant harm
- Communicating with children
- Issues of confidentiality and privilege
- The role and duties of the children's guardian
- The role of the child's solicitor

- Working with the children's guardian
- Advocacy in children's cases
- Local authority structures
- Communication with parties
- Instruction and use of experts
- Linked care and criminal proceedings
- Care planning
- Contact with children in care
- Case management and the Family Court
- Public Law Outline as finalised in the Children and Families Act
- Procedure, documents, timetabling and hearings under the new scheme

This course is specifically for those lawyers and legal executives who meet the requirements of and wish to apply to join the Law Society's Accreditation Scheme.

Speakers: **Fiona Cadwaladr** worked as a social worker and then manager for Cornwall County Council. In 1998 she joined the Cornwall Panel of Guardians and Litem and Reporting Officers. She continues to work as a self-employed children's guardian and **Tim Lewis** is Senior Partner of Johnson and Gaunt and has practised child protection, children law and adoption for over thirty years. He is a Deputy District Judge and a well respected and independent trainer.

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London	25 - 27 Feb
London	24 - 26 Jun

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£805 + VAT CLT Members/£1,350 + VAT Non-members



## Private Child Law Update 2015

**Hot  
Topic**

Update | 3 hours CPD

Private children law has changed significantly with the coming into force of The Children and Families Act. The contact and residence orders are dead and the child arrangement order is born. The consideration of mediation is now compulsory and legal aid has all but vanished.

These are challenging times for lawyers dealing with private children law and this course will tackle the real issues that confront you in practice on a regular basis. The day will review the recent case law and consider the Child Arrangements Programme to get you up to speed in this new regime.

What you will learn:

- The new provisions of the Children & Families Act in private law
- The workings of parental responsibility – including step-parents and same sex couples
- The provisions of the new Child Arrangements Programme
- Gatekeeping, allocation and timetabling under the new programme
- The consequences of the end of residence and Contact Orders
- Specific Issue Orders – religious and educational upbringing
- Relocation within the UK
- International Relocation – the latest case law
- Dealing with litigants in person and McKenzie Friends
- Costs Orders

This course is for all family lawyers, trainees, paralegals and legal executives wanting to update their knowledge of private law children work.

Speaker: **Graham Pegg** LLB, Solicitor, Senior Partner and head of the family law team, Pickerings, Tamworth. Graham has been a member of the Law Society's Children's Panel since its inception and is a specialist in child law.

Bristol	6 Mar am	Newcastle	22 May am
London	20 Mar, 8 May am		
Leeds	27 Mar am		
Birmingham	15 May am		

£140 + VAT CLT Members/£300 + VAT Non-members

## Public Child Law Update 2015

**Hot  
Topic**

Update | 3 hours CPD

The Children and Families Act is here, implementing the PLO and formalising other changes. Case law in this area has also been developing apace, giving guidance on important aspects of this area of work.

This day course is designed to bring you, the busy practitioner, up to date on the key issues that impact on your day to day practice of public law. The significant changes to legislation, to procedure and the recent case law will be dealt with in a practical and informative training session.

What you will learn:

- The key elements of the Children and Families Act
- Procedure now that the PLO is finalised
- Threshold criteria – shared care cases
- Instruction of Experts; the new regime
- Interim Orders – the Human Rights Act injunction
- The current public funding issues
- Professional Privilege – the pitfalls
- S.38(6) Orders – a creative approach
- Costs Orders
- An overview of recent cases in public law
- Detailed understanding of the recent leading cases.

This course is for all family lawyers, trainees, paralegals and legal executives wanting to update their knowledge of public law children work.

Speaker: **Graham Pegg** LLB, Solicitor, Senior Partner and head of the family law team, Pickerings, Tamworth. Graham has been a member of the Law Society's Children's Panel since its inception and is a specialist in child law.

Bristol	6 Mar pm	Newcastle	22 May pm
London	20 Mar, 8 May pm		
Leeds	27 Mar pm		
Birmingham	15 May pm		

£140 + VAT CLT Members/£300 + VAT Non-members

## Acting for Parents in Care Proceedings

Intermediate | 6 hours CPD

The lawyers who act for the local authority and the Guardian ad Litem may have years of specialist experience; the parents' solicitor may, initially at least, be a far more general practitioner and feel unnecessarily disadvantaged.

This course, run by an experienced care lawyer and popular speaker, will give you the edge when dealing with care proceedings. It will examine the entire process, specifically from the perspective of the lawyer acting for parents.

What you will learn about:

- How to deal with the pre-proceedings stage
- The case conference
- Emergency Protection Orders and other urgent remedies
- Part VI Family Law Act in care cases
- The care application, the 'threshold criteria' and standards of proof
- The process, documents, timetabling and hearings
- Comprehensive assessment, risk assessment and residential assessment
- How to use experts under the new rules
- The final hearing; care order, supervision order or neither
- Contact with children in care
- Adoption and placement for adoption
- How to work within the context of funding constraints.

This course is ideal for solicitors, paralegals and trainees practising care law, wanting to improve their practice and for those new to care work and wishing to act for parents.

Speaker: **Graham Pegg** LLB, Solicitor, Senior Partner and head of the family law team, Pickerings, Tamworth. Graham has been a member of the Law Society's Children's Panel since its inception and is a specialist in child law.

London	25 Feb
Manchester	27 Feb
Southampton	10 Apr
Bristol	15 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

Future dates available [online](#)

## CLT Membership

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**registrar@clt.co.uk**  
**[www.clt.co.uk/membership](http://www.clt.co.uk/membership)**

£400 minimum spend required with terms and conditions

## Private Client Conversion Course

Intermediate | 27 hours CPD

This course is designed to bring delegates up to a basic level of competence in private client work.

It is suitable for practitioners in any field wishing to change specialisms and also for trainees as it assumes no knowledge at the outset. There will be practical exercises and case studies throughout with plenty of opportunity for questions and discussion. Accompanying the course materials will be a resources pack with forms, guidance and other materials.

Due to the introductory nature of the course and fact that only the basics are covered, it may be necessary to attend some of our other courses for more advanced training.

### Day 1: Will Drafting and Basic Tax

Includes a look at the intestacy rules, the structure of a Will and specific clauses, IHT and CGT and variations and disclaimers.

### Day 2: Trusts

Includes principles and essential elements for creating trusts, taxation and drafting lifetime trusts.

### Day 3: Advising Elderly Clients

Includes the Mental Capacity Act 2005, the Code of Conduct, assessing mental capacity, Lasting Power of Attorney forms and nursing care funded by NHS.

### Day 4: Probate and Administration of Estates

Includes, property passing outside the will/intestacy, preparing the IHT205/IHT400, oaths, tax during the administration of estate, finalising IHT and estate accounts.

### Day 5: morning only

Workshop of practical exercises and case studies.

“ **The speakers were excellent, motivating and exceptional!** ”

Speakers: **Caroline Bielanska** is the former Chief Executive of Solicitors for the Elderly, an organisation she helped to found. She now provides consultancy for law firms on an independent basis, sits on the Court of Protection User's Group and sat on the formal Court of Protection Rules committee and **Anthony Miller** is a training consultant specialising in probate and the administration of estates and trusts. He qualified with the Institute of Financial Services (Trustee Diploma) and is a full member of The Society of Trust and Estate Practitioners (STEP). He has obtained the Diploma in Training Practice with the Institute of Personnel and Development. Anthony is a tutor and author for the STEP Administration of Estates paper and speaks on a number of other legal courses and **Martyn Packer** BA (Hons), LL.M, Solicitor, who worked in private practice as a probate and trusts lawyer. He is now a freelance training consultant in the fields of probate, will drafting and private client work and **Joe Swift** FCA, FCCA, ATII, TEP, Dip PFS, Consultant with Addleshaw Goddard, which is one of the largest firms of solicitors in England with a private client department and formerly a tax partner at Deloitte. Joe has lectured widely on tax and estate planning to various professional groups and clients.

London

2 - 6 Feb, 8 - 12 Jun

£1,100 + VAT CLT Members/£1,650 + VAT Non-members

## Will Drafting Masterclass

Masterclass | 5 hours CPD

In a time of increased competition anyone preparing wills needs to be confident in the quality of the product offered. This practical course covers the whole process starting with taking instructions; which is where things so often go wrong, then looking at planning points involved in wills for married couples, cohabitantes and the elderly and finally at detailed drafting points. It is designed to allow practitioners to take a fresh look at their drafting practices, particularly in the light of recent legislation and case law.

Mini-case studies and suitable precedents will accompany the materials and there will be opportunities for questions and discussion. The course will also provide a thorough review of negligence and best practice.

### Session 1: Taking Instructions: What do You Need to Know?

- Details of property owned including examination of case law surrounding proprietary estoppel, constructive/resulting trusts and bank accounts
- Details of family and dependants including possible claims under I(PFD)A 1975
- Any reason to question capacity/consider undue influence? Should you see earlier wills? *Kenward vs. Adams*, *Charles vs. Fraser*. What about the golden rule? *Key vs. Key*, *Wharton vs. Bancroft* and *Others*. What is undue influence: *Hubbard vs. Scott*? Liability for costs?

### Session 2: Planning the Will

- Spouses and children including advantages and disadvantages of using the transferable nil band, discretionary trusts and IHTA 1984, s.144 and flexible life interest
- Cohabitantes and children
- Opportunities and pitfalls of using pilot trusts?
- Property eligible for BPR-maximising relief, IHTA 1984, s.39A and double dip
- Are mutual wills ever a good idea?

### Session 3: Will Drafting

- Topping: revocation and foreign wills and will in expectation of marriage/formation of civil partnership
- Tailing: signature on behalf of testator and special attestation clauses
- People: executors and trustees, partners in firm, charging clauses, IHTA 1984, s.144 problems, exemption clauses, self-dealing and guardians
- Beneficiaries including survivorship clauses, charities and Wills Act 1837, s.33
- Non-residuary gifts including burden of IHT and NRB formula clauses
- Specific legacies including expenses of transfer and intermediate income
- Residuary gifts
- Reduced rate for charities
- Administrative provisions including Inheritance and Trustees' Powers Act and STEP Standard Provisions

Speaker: **Professor Lesley King**, Professional Development Consultant at the University of Law is co-author of *Wills, Taxation and Administration: A Practical Guide; A Modern Approach to Wills, Administration and Estate Planning (with Precedents); A Practitioner's Guide to Wills; Wills: A Practical Guide* and editor of *The Probate Practitioner's Handbook*. She is the wills and probate columnist for the *Law Society Gazette*, and writes and lectures extensively on wills, taxation and related matters.

“ Thank you very much. This was the best course I have been on. I have learned such a lot, thank you ”

Manchester	19 Feb
London	24 Feb, 19 May
Birmingham	20 May

£310+ VAT CLT Members/£495 + VAT Non-members

## Wills and Probate Update 2015

Update | 5 hours CPD

This course will acquaint private client practitioners with recent developments in the areas of will drafting, construction and interpretation, trusts and probate practice and related tax issues to ensure practitioners can apply these developments to their daily practice and be able to discuss the changes in an informed way with colleagues and clients. It will also look ahead to future developments.

The course will cover:

- Wills, trusts and probate cases and developments including: - Testamentary capacity - Interpretation and construction - Liability for negligent advice - Equitable remedies, rectification, rescission - *Hastings Bass and Mistake* - Constructive trusts and proprietary estoppel - Family provision claims - Income vs. Capital - Inheritance and Trustees' Powers Act 2014
- IHT cases and developments including: - Reliefs - Variations - Compliance - Miscellaneous tax issue - CGT cases - Compliance and guidance
- Future developments

Speaker: **Professor Lesley King**, Professional Development Consultant at the University of Law is co-author of *Wills, Taxation and Administration: A Practical Guide*; *A Modern Approach to Wills, Administration and Estate Planning (with Precedents)*; *A Practitioner's Guide to Wills*; *Wills: A Practical Guide* and editor of *The Probate Practitioner's Handbook*. She is the wills and probate columnist for the *Law Society Gazette*, and writes and lectures extensively on wills, taxation and related matters.

Or **Nick Shaw** MA (Cantab), TEP is a consultant with the trust and tax team at Addleshaw Goddard.

London	5 Mar
Leeds	12 Mar
Manchester	19 Mar
Birmingham	26 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

## Certificate in Will Drafting

Foundation | 5 hours CPD

This course is aimed at those with little or no experience of will drafting. By the end of the course the delegate will feel confident in drafting not only simple, but also more complex wills and their ensuing due execution. In particular it will deal with:

- Capacity and intention to make a will, and how to resolve problems
- Appointment of executors
- Appointment of guardians
- Types of legacy and problems in drafting including: lapse, ademption and abatement
- Particular assets including - Business assets - Advantages, problems and pitfalls, the matrimonial home - How to protect the surviving spouse's rights of occupation
- Drafting residuary gifts: how to avoid a partial intestacy
- Trusts: types, uses and taxation
- Trustees powers in the light of the Trustee Act 2000: are express powers still necessary?
- Formalities and solicitor's duty in relation to execution
- Tax efficient will drafting
- Some common howlers

*"Excellent, clear and laced with good diagrams."*

Speaker: **Martyn Packer** BA (Hons), LLM, Solicitor, who worked in private practice as a probate and trusts lawyer. He is now a freelance training consultant in the fields of probate, will drafting and private client work.

Leeds	22 Apr
Birmingham	27 Apr
London	29 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

## 1975 Act and Other Claims Against PRs

Intermediate | 5 hours CPD

This course will equip private client practitioners and experienced litigators with a comprehensive but practical understanding of claims under the Inheritance (Provision for Family and Dependants) Act 1975 and other causes of action often deployed to acquire an interest in an estate. It will also cover actions PRs may bring against third parties and the resolution of administration disputes with beneficiaries and an in-depth discussion on costs, concentrating on the special rules and categories used by the courts in estate litigation, with particular emphasis on the various steps that should be taken with a view to protecting the client's position on costs.

Attendance on this course will concentrate on recent interesting cases, which will leave delegates confident that their knowledge is up-to-date.

The course will cover:

- Claims under the Inheritance (Provision for Family and Dependants) Act 1975
- Proprietary estoppel
- Constructive trust claims over land
- Undue influence
- Mutual wills and secret trusts
- Rectification and construction
- Administration actions, disputes over accounts and removal of PRs
- Practice, procedure and costs

Speaker: **Edward Hewitt** is a member of 3 Stone Buildings. He practices in a range of Chancery areas specialising in trusts and estates, both from an advisory and litigious perspective as well as real property and insolvency.

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Leeds	21 Apr
London	23 Apr

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£210 + VAT CLT Members/£450 + VAT Non-members

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<b>10</b>	<b>£375</b>	<b>£750</b>
<b>20</b>	<b>£599</b>	<b>£1199</b>

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## Certificate in Probate and Administration of Estates

Foundation | 12 hours CPD

This is a structured two day course designed for those practitioners wishing to gain a good practical grounding in this field.

It is suitable for trainees and newly qualified solicitors who have had little or no grounding at the academic stage, for those returning after a career break and those wishing to change specialisms. It covers all aspects post-death through to finalisation of the estate.

- Good overview of steps in an administration
- Personal representatives: Different types, their duties and authority and options available
- The initial interview: Who is my client? What is my general duty to my client?
- Taking instructions: information required, immediate practicalities to address
- Setting up the file; initial letters; organising and managing the file
- Obtaining information about the estate and ascertaining beneficial entitlement
- Property passing outside the will or intestacy: 'jointly owned property'
- Is there a 'will?' Is it the last will? Are the clauses valid? Is it admissible to probate?
- Entitlement on intestacy
- Preparing the papers to lead to the grant: Responsibilities of Personal Representatives; Form IHT 400, calculation and payment of IHT, and raising funds to meet IHT liability
- Completion of Oath for common form Grants: Probate, Letters of Administration with the will annexed and Letters of Administration

- Other evidence: affidavits of due execution, plight and condition and identity
- Administering the estate: collecting in assets, paying debts and legacies, settling deceased's tax liability to date of death
- Tax during the administration of estate: PRs liability, payments to beneficiaries during the administration and disposals during administration
- Finalising IHT, corrective accounts and obtaining Clearance Certificate
- Finalising the administration: Estate and Distribution Accounts, Transfer to beneficiary entitled
- Inheritance (Provision for Family and Dependents) Act claims
- Post-mortem tax planning: variations and disclaimers, examples of uses, traps for the unwary and the duty to advise (*Cancer Research vs. Ernest Brown*)

Speaker: **Anthony Miller** is a training consultant specialising in probate and the administration of estates and trusts. He qualified with the Institute of Financial Services (Trustee Diploma) and is a full member of The Society of Trust and Estate Practitioners (STEP). He has obtained the Diploma in Training Practice with the Institute of Personnel and Development. Anthony is a tutor and author for the STEP Administration of Estates paper and speaks on a number of other legal courses.

“ Tutor was very helpful and knowledgeable and answered any question I had ”

London

11 - 12 Mar, 3 - 4 Jun

£495 + VAT CLT Members/£795 + VAT Non-members

# Trusts: Drafting to Distribution

Intermediate | 6 hours CPD

This course looks at the practical issues involved in trusts from the outset, when the professional has to advise the client upon the most appropriate form of trust for their needs, through the key drafting aspects of the trust deed, the setting up of the trust, some practical aspects during the course of administration and, finally, completing the distribution to the beneficiaries.

The course includes:

- Features of and tax considerations relating to the main types of trust
- The rules against perpetuities and excessive accumulations
- Administrative provisions
- Powers and duties of trustees
- Administering the trust
- Example calculations of IHT charges in relevant property trusts
- Income Tax pool examples for discretionary trusts
- Appointment and retirement of trustees, appointment and advancement of trust funds, variation of trusts
- Breach of trust
- Trustee liability and overview of litigation
- Termination of the trust

Speaker: **Leon Pickering** has a particular interest in private client work, acting as both sole counsel and being led in very high value cases. He is often brought in to deal with complex financial issues in larger cases. Leon also has a strong advisory and non-contentious practice. He gives seminars on all aspects of private client work including succession, tax and charities and he is one of the co-authors of *Tolley's Inheritance Tax Planning*. Leon is an accredited mediator and a member of the Chancery Bar Association.

London	21 Apr
Leeds	28 Apr
Birmingham	12 May
Manchester	19 May

£210 + VAT CLT Members/£450 + VAT Non-members

# Developing Your Court of Protection Practice

Intermediate | 5 hours CPD

Court of Protection work is on the increase and becoming more complex as more clients become mentally compromised. Many individuals who fail to make LPAs fall within this jurisdiction. This presents a practice development opportunity for private client lawyers who need to offer a service to clients in order to meet the demand for Court of Protection applications.

As well as marketing and practice opportunities, this course includes sample forms and a case law update, and will equip practitioners with the skills to tackle the range of applications with confidence.

Recent Court of Protection statistics show that a large proportion of applications submitted contained errors. This course therefore looks at basic applications as well as wider applications with the intention of reducing the occurrence of such errors in the future.

It will also cover:

- The courts jurisdiction and functions of the Office of Public Guardian
- When to apply to the court for a welfare/financial decision
- The application and procedure for the appointment of a deputy
- The application and procedure for Single Orders
- Sale and purchase of property
- Trustees' applications
- Gifts, settlements and statutory wills
- Making decisions as a deputy
- Making the most of state support
- Getting paid.

Speaker: **Caroline Bielanska** is the former Chief Executive of Solicitors for the Elderly, an organisation she helped to found. She now provides consultancy for law firms on an independent basis, sits on the Court of Protection User's Group and sat on the formal Court of Protection Rules committee.

London	11 May
Leeds	12 May
Birmingham	14 May

£210 + VAT CLT Members/£450 + VAT Non-members



## Court of Protection and Lasting Powers of Attorney Update 2015

Update | 6 hours CPD

This practical course updates on current issues affecting all lawyers who undertake Court of Protection and LPA work.

The course will cover:

- Behind the scenes at the court and the OPG
- LPA/EPA case law update
- Advising attorneys and deputies on their duties and responsibilities
- Gifts and maintenance
- Investments
- Court of Protection case law update

Speaker: **Caroline Bielanska** is former Chief Executive of Solicitors for the Elderly and provides consultancy for law firms on an independent basis. She is a committee member on STEP's Special Interest Group on Mental Capacity and sits on the Court of Protection Users' Group. She works closely with the OPG and assisted in the development of the 2009 Prescribed LPA forms and accompanying guidance, has been involved in the on line digitalisation of OPG services. She sits on the current Court of Protection Rules Review Committee. She is author of a number of publications, including contributor to Heywood and Massey's *Court of Protection Practice*, *The Health and Social Care Handbook* (the Law Society) and *Elderly People and the Law* (Jordans).

“ Beautifully presented and highly informative seminar, presented by a genuine expert in the field ”

Manchester 10 Apr  
London 9 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

## Elderly Client 2015 Update

Intermediate | 5 hours CPD

This course covers recent case law as well as new and pending legislation.

Advice for elderly clients is an area of expertise which is constantly developing. It covers a wide range of subjects including case law, property, LPAs, Court of Protection, care funding (local authority and NHS), social security and professional conduct issues. It will also look ahead to the introduction of the Care Act and the new arrangements for paying for care.

The detailed notes include practical examples, draft clauses, specimen letters and action points. The materials are constantly updated to provide you with a thorough and valuable resource of information.

Speaker: **Sheree Green**, member of the Law Society Committee on Mental Health and Disability, is a senior associate solicitor in Anthony Collins Solicitors' personal planning and management team with particular expertise in mental health and mental capacity issues, trusts and probate and administration.

Or **Alan Robinson**, after being principal of his own firm for over 30 years specialising in elderly client, is now a consultant. He has worked in the area of community care since its inception and currently teaches community care law for the Open University. He is also a contributor to *Tottel's Older Clients Law Service*.

Leeds 4 Mar,  
London 18 Mar, 16 Jun  
Birmingham 25 Mar  
Bristol 17 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

# Adult Safeguarding: A Practical Guide and Update

Intermediate | 5 hours CPD

Adult safeguarding work in the new Court of Protection centres is booming. This course is suitable as a grounding in the subject and also as a refresher and update for those already practising in it.

The course will cover:

- New Statutory Framework for Safeguarding under the Care Act 2014
- Safeguarding and Personalisation - Making Safeguarding Personal
- Safeguarding Process and Procedure
- Types and patterns of abuse and neglect
- Responding to abuse and neglect – what are the options ?
- Mental capacity and decision making: The Mental Capacity Act 2005
- The role of Court of Protection and Public Guardian
- The role of the Independent Mental Capacity Advocate (IMCA) and the new Independent Advocate under the Care Act 2014
- Introduction to the Deprivation of Liberty Safeguards
- Legal aid and the Court of Protection
- Human Rights Act 1998
- New Duty of Candour
- Recent case law developments

Speaker: **Susan Inker** is a freelance legal and training consultant who formerly worked as a family lawyer in practice. She has developed and delivered training in the legal framework surrounding vulnerable children and adults, mental capacity and domestic violence law.

London	14 Apr
Leeds	14 May
Birmingham	23 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## The Care Act and Funding Care **NEW**

Intermediate | 5 hours CPD

Reform to social care law and funding contained in the Care Act 2014 will have a significant impact on all people needing care and support, irrespective of whether they have the resources to fund their care.

Advisers will need to know how to access an assessment, work out whether the client is eligible for services, how to fund sustainable care, what happens when resources run low or the client has contributed sufficiently to seek state support and how this all fits in with NHS funded care.

This course looks in detail at these points and the impact of the new legislation on the advice that should be given to clients.

Speaker: **Caroline Bielanska** is former Chief Executive of Solicitors for the Elderly and provides consultancy for law firms on an independent basis. She is a committee member on STEP's Special Interest Group on Mental Capacity and sits on the Court of Protection Users' Group. She works closely with the OPG and assisted in the development of the 2009 Prescribed LPA forms and accompanying guidance, has been involved in the on line digitalisation of OPG services. She sits on the current Court of Protection Rules Review Committee. She is author of a number of publications, including contributor to Heywood and Massey's Court of Protection Practice, The Health and Social Care Handbook (the Law Society) and Elderly People and the Law (Jordans).

**“A highly professional and knowledgeable presentation”**

Derby	10 Feb	Swindon	5 Mar
Lincoln	12 Feb	Southampton	10 Mar
Plymouth	13 Feb	London	19 Mar
Norwich	3 Mar	Birmingham	20 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

## Practical Probate: The Works

Foundation | 6 hours CPD

This course will give a detailed and reassuring overview of the complete process of handling an estate in a cost efficient manner without compromising client service. A winning combination!

- Taking instructions: who is your client and who is not • Ascertaining details of assets for both probate and tax purposes, taking control and identifying type of ownership of the assets and establishing liabilities of the estate • Establishing a client led step by step procedure to confidently handle the estate information received throughout the whole administration of the estate, resulting in an excellent client relationship between you and your client • Establishing the validity of the will/status under intestate succession, and preparing and completing through worked examples the Oath and HMRC accounts (full copies and supporting documentation provided) • Collecting in, transferring the assets, settling debts/liabilities from the correct assets of the estate • Distribution under the Intestacy rules or terms of the will, interim distributions and missing beneficiaries • Finalising the administration, preparation of estate accounts, obtaining client acceptance of your legal fees, tax vouchers and vesting of estate assets.

Speaker: **Linda Pratt** LLB (Hons), TEP retired non-practising solicitor and formerly a principal of her own elderly client practice. Linda is a member of the executive committee of the Law Society's private client section.

“ By far the best course of my legal career! ”

London	25 Jan, 10 Mar, 1 Jun
Bristol	3 Jun
Birmingham	5 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## Wills Quality Schemes: WIQS and STEP

Update | 6 hours CPD

**Hot  
Topic**

Increased competition and clients demanding transparency and excellent client service means it is more important than ever for will drafting firms with real expertise to find a way to demonstrate that specialist knowledge.

The WIQS and the STEP Code both aim to raise standards and ensure that participants deliver a quality service to clients. As both are relatively new, it is understandable that practitioners are seeking more information; in particular, what they offer and what they require of the participants.

This course covers all you need to know, including:

- Are you coming to terms with the STEP Code or the Law Society's quality scheme? • How do the two compare including estate administration in WIQS?
- Are you considering joining WIQS; what are the pros and cons? • Do you have one or more STEP members but need greater understanding of their Wills Code?
- Are you planning to employ a STEP member for the first time? • What are the key practice issues needing proper attention? • What lessons can we learn from WIQS, for practice, even if not proceeding? • How can the more onerous rules be implemented most effectively?

Speaker: **John Bunker** is head of private client knowledge management for Thomas Eggar LLP, a role developed after 26 years with the firm specialising in wills, trusts, estate and tax planning. In more recent years he has developed regular training in these areas. He has worked extensively with financial planners and investment managers for mutual clients and has played a leading role in developing relationships with financial planners for the firm.

Leeds	12 Jun
London	25 Jun
Birmingham	26 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## The Older Client: A Masterclass **NEW**



Masterclass | 6 hours CPD

Examining the primary issues of concern for the older client, this course tackles the challenges for the solicitor in advising on powers of attorney and gifts, considering issues relating to cross-generational home-sharing, and appropriate and successful outcomes in Statutory Will applications. The implications of working with clients in the early stages of dementia, or vulnerable due to bereavement or other influences will be explored, with use of case studies and sample precedents. Ample opportunity will be given for questions and discussion, and the course will allow for thorough consideration of the relevant ethics and duties of the solicitor where issues of capacity and undue influence may arise.

### Session 1: Lasting Powers of Attorney

This session looks at successful drafting and common pitfalls, to enable practitioners to review their practice, in the light of recent case law.

- Taking Instructions
- Choice of attorneys
- Issues regarding joint, joint and several and replacement attorneys (*Re Boff* (COP) case 12338771)
- Use of restrictions, conditions and guidance
- Role of Certificate Provider
- Confidentiality & 3rd party involvement
- Duties to the attorney
- Concerns of financial abuse (*The Public Guardian vs. JM* [2014] EWHC B4 (COP))

### Session 2: Statutory Wills

- Initial considerations
- Making the application including the draft will
- Respondent sensitivities (*Re AB* [2013] EWHC B39 (COP))
- Best Interests (*NT vs. FS* (2013) EWHC 684)

### Session 3: Sharing a Home

Hoping for the best, yet planning for the worst.

- Informal arrangements (*JS vs. KB, MP* [2014] EWHC 483 (COP))
- Pooling to purchase
- Paying for the extension

- 'Move in to look after me, and the house will be yours' (*Bradbury vs. Taylor & Burkinshaw* [2012] EWCA Civ 1208)
- The role of the 'family solicitor'
- Drafting challenges
- Tax matters

### Session 4: Gifts

- Minimising the risks
- Anti-avoidance
- Lifetime gifts from settlements (*Re JDS:KGS vs. JDS* [2012] EWHC 302 (COP) and *Re AK* (Gift Application) [2014] EWHC B11 (COP))
- 'De Minimis' (In the Matter of GM (Case number 11843118))

Speaker: **Sheree Green**, member of the Law Society Committee on Mental Health and Disability, is a senior associate solicitor in Anthony Collins Solicitors' personal planning and management team with particular expertise in mental health and mental capacity issues, trusts and probate and administration.

“Excellent course. Speaker so informative and sharing of her own experiences in practice as well as substantial law”

London	11 Feb, 24 Jun
Manchester	13 May
Lincoln	10 Jun

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Speaker: Mena Ruparel

### **Consent Orders in Matrimonial Finance: The Devil in the Detail**

Speaker: Mena Ruparel

### **Fact Finding Hearings in Children Cases**

Speaker: Stephen Parker

### **Enforcing the New Child Arrangement Orders**

Speaker: Stephen Parker

### **Re B (a Child): Placement Orders, Care Planning and Preparation of Evidence**

Speaker: Ruth Cabeza

### **Land Registry Top Tips For Family Lawyers**

Speaker: Lorraine Richardson

### **Costs In Financial Applications: Getting it Right**

Speaker: Mena Ruparel

### **Lasting Powers of Attorney - Safeguarding and Minimising the Risk to Donors**

Speaker: Caroline Bielanska

### **The Inheritance and Trustees' Powers Bill - since enacted**

Speaker: Lesley King

### **International Child Abduction**

Speaker: Jacqueline Renton

### **ICOs, PPOs and EPOs: Urgent Applications**

Speaker: Stephen Parker

### **Drafting the s.25 Witness Statement in Financial Provision Cases**

Speaker: Mena Ruparel



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## Certificate in Company Law Practice **Best Seller**

Foundation | 6 hours CPD

This highly practical course will introduce you to the essential elements of company law.

Designed for both commercial practitioners seeking a greater understanding of the topic and those looking to refresh their knowledge with the latest position, it will particularly focus on the aspects involved within the following topics:

- Company law fundamentals - Companies Act 2006 - incorporation and limited liability - public companies vs. private companies - memorandum and articles of association - winding up and administration.
- Directors - appointment, removal and disqualification of directors - role of directors - board meetings - directors' duties.
- Shareholders - role of shareholders - shareholders' written resolutions - unfair prejudice - derivative actions.
- Shares - allotment of shares - statutory preemption right - classes of shares - capital maintenance.

Speaker: **Nigel Banerjee** teaches at King's College London and previously worked as a corporate professional support lawyer in the City.

London 14 Apr, 17 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## Company Law Update **Best Seller**

Update | 6 hours CPD

This course provides you with a comprehensive and up-to-date exploration of the key provisions of the Companies Act 2006, as well as a review of other relevant elements of corporate ownership and management.

The course will assist legal practitioners and non-legal professionals alike, overseas lawyers starting work in England or Wales, those returning from a career break and anyone requiring a substantive review or update of company law.

Topics covered include:

- Company formation • Constitution • Shareholders' meetings and resolutions
- Directors: definitions, appointment and removal • Directors duties • Transactions
- Derivative actions and unfair prejudice • Other risks and liabilities • Execution of documents • Registration of charges • Maintenance of capital • Directors' interests in share capital • Disclosure and transparency • Takeovers • Insolvency and administration.

Speaker: **Ed Davies** is a freelance professional trainer, designing and delivering professional development and skills courses. He was formerly in private practice with Freshfields and Olswang.

Leeds 2 Mar  
Bristol 3 Mar  
London 4 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

# An Introduction to Corporate Governance

Foundation | 6 hours CPD

This course will be of benefit to all corporate lawyers, corporate governance professionals and company secretaries, as well as to company directors themselves.

This full-day course provides an introduction to the key aspects of corporate governance in the UK and the concepts on which it is based, with particular reference to the major codes and other regimes applicable in different circumstances, as well as those applying to investors. The course considers the development of corporate governance (drawing on some personal reminiscences of the speaker), the legal structures on which governance is based and the “voluntary” nature of different UK codes; and it examines some of the practical implications of current corporate governance reporting regimes.

It will include :

- An introduction to the world of corporate governance, and the UK's place in it
- The purpose and value of good governance • Unlisted companies • Issues when considering “listing” or “quotation” • FRC Guidance documents • The “comply or explain” regime of the UK Corporate Governance Code • The “corporate governance statement” • Relations with shareholders • The UK Stewardship Code • “Comply or explain” under the UK Stewardship Code • Future developments: the EU?

Speaker: **Mark Cardale** is a corporate lawyer and worked for many years with Slaughter and May. He acquired an interest in corporate governance while head of the firm's then New York office during the era of Enron and other corporate accounting scandals in the US.

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London 7 May

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£210 + VAT CLT Members/£450 + VAT Non-members

## Hot Topic

# Company Constitutions - What You Need to Know

Intermediate | 3 hours CPD

This course provides you with the key features of a private company's constitution, with a particular focus on the relationship between the articles and the substantive provisions of the Companies Act 2006. It will cover:

- Contents of articles • Division of powers between shareholders and directors
- Drafting the directors' power to delegate in light of Smith vs. Butler (2012)
- Decisions by directors • Appointment of directors • Dealing with ss.175 and 177 CA 2006 (conflicts duties) • Controlling the share structure • Dividends • Potential pitfalls and how to avoid them • Altering the articles • Procedure and documentation • Limits on shareholders' freedom to amend • The legal nature of the constitution • Relationship between memorandum and articles • Sections 17 and 257 CA 2006 (definition of 'constitution') • Section 171(a) CA 2006 (director's duty to act in accordance with constitution) • Enforcement.

Speaker: **Nigel Banerjee** teaches at King's College London and previously worked as a corporate professional support lawyer in the City.

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London 17 Apr am

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£210 + VAT CLT Members/£450 + VAT Non-members

## Introduction to Due Diligence **NEW**

Foundation | 3 hours CPD

This half-day course is an essential introduction for all of those joining a corporate department or who will be called on to provide corporate support. It will also be particularly useful for in-house counsel who may be called on to give advice and guidance during the process of a company sale or purchase, including sensible steps to take to prepare for the due diligence process and best practice suggestions. During the course delegates will compile their own best practice checklist for due diligence and then test it in a small due diligence exercise.

This course is a useful continuation from "Essential Elements of a Private Acquisition" course.

It will deal with the following:

- Due Diligence Questionnaire (preparation and response)
- Data Rooms
- Preparation of a pro-forma checklist for use when conducting due diligence
- Due Diligence exercise/evaluation of common issues
- Disclosure letter

Speaker: **Jackie Sheldon** is a freelance senior lecturer specialising in designing, writing and delivering courses on company law. Jackie qualified as a corporate solicitor in the City at Taylor Wessing before moving to the North West and working at Pannone LLP and Hammonds. Jackie has been teaching for over 9 years, is a Fellow of the Higher Education Academy and has a Post Graduate Certificate in Professional Education. Jackie is currently delivering modules on the Legal Practice Course/Graduate Diploma in Law at BPP University.

London	16 Jun pm
Manchester	25 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

## Essential Elements of Private Company Acquisition

Intermediate | 3 hours CPD

This half-day course provides an overview of a private company acquisition. It will consider the key elements of a transaction from initial instructions up to and including completion. It is an essential overview for all those joining a corporate department and will be particularly useful for in-house counsel who may be called upon to give advice and guidance during the process of a company sale or purchase.

It will deal with the following:

- Key elements involved in a private treaty sale
- Differences between a share sale and asset sale
- Share purchase agreement – clauses and negotiation points including:
  - Warranties
  - Indemnities
  - Seller protection clauses
- Additional considerations for an asset purchase agreement
- An overview of the due diligence and disclosure process [See Introduction to Due Diligence and Disclosure for a more detailed understanding]
- Factors to consider at completion

Speaker: **Jackie Sheldon** is a freelance senior lecturer specialising in designing, writing and delivering courses on company law. Jackie qualified as a corporate solicitor in the City at Taylor Wessing before moving to the North West and working at Pannone LLP and Hammonds. Jackie has been teaching for over 9 years, is a Fellow of the Higher Education Academy and has a Post Graduate Certificate in Professional Education. Jackie is currently delivering modules on the Legal Practice Course/Graduate Diploma in Law at BPP University.

London	16 Jun pm
Manchester	25 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

### Negotiating Tax Warranties and Tax Covenants in M&A Transactions **NEW**

Intermediate | 3 hours CPD

This practical and user-friendly course will explain how to negotiate tax warranties and tax covenants in M&A transactions.

It will be invaluable to in-house lawyers or corporate lawyers dealing with tax provisions in share purchase agreements whose firm does not have in-house tax expertise.

You will learn about:

- The reasons for each provision in a standard tax covenant and set of tax warranties
- The key issues from the Seller's and Buyer's perspectives - who wants what and why?
- The traps for the unwary and the danger of accepting model forms
- What to focus on if you need to get to a reasonable position quickly and effectively
- What tax issues to look out for elsewhere in the share purchase agreement

Speaker: **Andrew Prowse** is a corporate tax partner at Field Fisher Waterhouse LLP. He is a solicitor and chartered tax adviser who has experience of the full gamut of corporate tax, with a particular emphasis on M&A transactions, joint ventures, company reorganisations and venture capital investment. Andrew developed FFW's popular tax blog ([taxdeductionsblog.ffw.com](http://taxdeductionsblog.ffw.com)), which launched in 2012.

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London 14 May am

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£140 + VAT CLT Members/£300 + VAT Non-members

### Drafting a Shareholder Agreement

Intermediate | 6 hours CPD

The Companies Act 2006, which introduced a company constitution and new model articles of association, has had a radical effect on traditional shareholder agreements.

This course looks at the content, form and style of shareholders' agreements against the background of the company's constitution with particular reference to 'quasi-partnership' companies.

Topics include:

- Shareholders' agreements - when and why?
- The company's constitution
- 'Standard' changes to the model articles
- The governance framework
- Matter requiring consent
- Share transfer provisions
- What is a 'good'/'bad' leaver?
- Restrictive covenants

Speaker: **Keith Lewington**, MA (Oxon), Solicitor, spent 25 years as a partner in a national law firm. He now practises as part of an innovative virtual law firm, Excello Law Ltd.

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Birmingham 19 Mar  
London 25 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members



## Bond Finance: The Fundamentals

Foundation | 6 hours CPD

Bond finance has never been cheaper. This course is designed to give you a fundamental working knowledge of bonds and fixed income securities and will be valuable for all lawyers working with banking or corporate clients in debt finance. The course looks at the range of products along with the roles and motivations of issuers, investors and intermediaries. It includes a section on the bond issuing process from origination through to secondary market trading. All the jargon and terminology is fully explained. The course will examine:

- Bond basics - definition and key features - what is a bond? - domestic and international markets - roles of the issuer, investor and intermediary
- Money markets instruments - definition and key features of LIBOR vs. base rate - T.Bills, CD's, acceptances, CP, money market funds
- Bond structures - typical bond structures - fixed and floating rate bonds - derivatives - interest rate swaps (IRS) - structured securities, zeros, hybrids and convertibles
- The price/yield relationship
- Credit ratings and the ratings agencies
- Macroeconomics and yield curves
- Issuing bonds - the primary market

Speaker: **Derek Taylor** has had a long career in finance/treasury in London and New York. He is an associate of the Institute of Bankers, a member of the ACI, the Financial Markets Association (Forex) and a member of the Society of Technical Analysts.

London 9 Jun

£300 + VAT CLT Members/£495 + VAT Non-members

## Introduction to Sharia and Islamic Finance **NEW**

Foundation | 6 hours CPD

Islamic finance is one of the fastest growth areas in the world of finance, with annual growth estimated at between 15-20%.

This is an introductory level course for solicitors and accountants who are new to the world of Islamic finance and Sharia law.

It explains the basic Islamic economic concepts as well as the key sources and principles of Sharia law.

Topics covered include:

- Introduction and overview
- The Islamic economic system: key concepts
- Sharia law: key sources
- Key principles governing Sharia compliant transactions
- Islamic law of contract
- Sharia compliant modes of finance
- Sharia compliant investments
- 'Islamic insurance' - *Takaful*

Speaker: **Faizal Karbani** is a chartered accountant who has been working in the Islamic Finance industry since 2005, specialising in providing Sharia compliant independent financial advice. He has also worked with leading global Sharia consultancy firm Dar Al Istithmar and for Qatar Islamic Bank (UK). Faizal is an approved trainer for the Islamic finance qualification. He has worked with the UK Al Qalam panel of scholars, the UK government on tax legislation changes related to Islamic finance and is a member of the Islamic Finance Experts Group formed by the Muslim Council of Britain.

London 19 May

£300 + VAT CLT Members/£495 + VAT Non-members

### Certificate in Commercial Contract Drafting

**Best  
Seller**

Foundation | 12 hours CPD

This two-day course is aimed at solicitors with little or no experience of drafting commercial contracts. It will be of particular interest to in-house lawyers and will also be a useful refresher to those returning from a career break. It equips you with the essential knowledge and skills that you need to negotiate and draft a commercial agreement. It will look at frame agreements, standard terms, purchase orders and web contracting.

Day 1 - Key legal concepts underpinning commercial contracts and how to draft a contract:

- Parties, price, scope and duration • Setting up different types of agreements
- Using a frame agreement • Warranties, indemnities, guarantees • Risk management • IPR, licences, background and foreground • Termination and liability and waiver • Boiler plate provisions (inc. force majeure, entire agreement and jurisdiction) • Restricting competition

Day 2 - Learning negotiation skills and application of knowledge in case studies:

- Services contracts under a frame agreement • Goods contracts and sub-contracts
- How to negotiate: - Understanding the leverage - Styles/tactics - Track change issues - Authority and capacity.

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

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<b>Leeds London</b>	<b>2 - 3 Mar 16 - 17 Apr</b>
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£495 + VAT CLT Members/£795 + VAT Non-members

### Drafting Commercial Contracts

**Best  
Seller**

Intermediate | 6 hours CPD

Developed for the commercial lawyer, this course will refresh and update you on the key points of contract law and places them in a highly practical context.

Topics covered include:

- Formation
- Capacity and privity
- Express and implied terms
- Conditions precedent (including best endeavours)
- Time of the essence
- Warranties and indemnities
- Exclusion and limitation
- Force majeure
- Misrepresentation
- Entire agreement clauses
- Execution of deeds and documents post-October 2009
- Discharge of contracts
- Contractual and equitable remedies

Speaker: **Ed Davies** is a freelance professional trainer, designing and delivering professional development and skills courses. He was formerly in private practice with Freshfields and Olswang.

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<b>Bristol London</b>	<b>5 May 6 May</b>
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£210 + VAT CLT Members/£450 + VAT Non-members

## Drafting Around Tricky Commercial Contract Problems 2015 **NEW**

Intermediate | 6 hours CPD

This drafting course is aimed at solicitors in private practice and in-house. It reviews and discusses precedent clauses and identifies their advantages and pitfalls in everyday use. It is relevant in a number of different contractual contexts from purchaser to supplier and bespoke contracts to standard terms and conditions. It will also update you on relevant case law.

Topics covered include:

- Selecting the right structure - frame agreements, the website and deeds
- Authorisation and acceptance criteria
- Supplier obligations - how to boost performance: scope, warranties, performance guarantees and time
- Quality markers - rejection, KPIs and SLAs
- Limiting liability for performance (contractual and non-contractual)
- Breach and termination
- Financial remedies within the contract - liquidated damages
- Compliance - data protection, bribery and TUPE
- Boilerplate traps

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

<b>Manchester</b>	<b>8 May</b>
<b>London</b>	<b>15 May</b>

£210 + VAT CLT Members/£450 + VAT Non-members

## Limiting Liability - Indemnities, Warranties and Guarantees That Work **Best Seller**

Advanced | 6 hours CPD

This course is aimed at experienced practitioners who negotiate and draft commercial contracts in private practice and in-house and may also be of interest to litigators. It undertakes an in-depth review of the problem areas around the limitation of liability in commercial contracts. It will also identify common obstacles in negotiations and suggest ways in which these can be navigated.

Topics covered include:

- Limitation of liability: caps, what is reasonable? Deliberate breach scenarios; relationship with entire agreement, warranties and indemnities
- Indemnities: providing and resisting, scope and 'trigger' mechanisms, support or replace the obligation, enforcement
- Warranties: what can be covered? How to tailor to specific use; services warranties, title, IPR and quality, flow-down and chain issues
- Financial and performance guarantees: form and structure, primary and secondary issues, using bonds and escrow, the impact of change control, e-signatures and pre-emptive defences and enforcement

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

<b>London</b>	<b>20 Mar</b>
<b>Leeds</b>	<b>27 Mar</b>

£210 + VAT CLT Members/£450 + VAT Non-members

## Executing Documents: How to Get it Right First Time **NEW**

Foundation | 3 hours CPD

The deal is done and completion documents are ready, but you are not home and dry. It is surprising how often last minute hitches and queries arise and you need to be equipped to advise your client with confidence. This course provides a comprehensive guide for all commercial practitioners on the signing and execution of documents. It reviews recent guidance and cases and explains some of the more challenging situations that you will have to deal with in practice.

Topics covered include:

- Can one director sign for several entities?
- Electronic signatures
- Counterparts
- Execution blocks (deeds and under hand)
- Power of attorney
- Land Registry guidance
- Completion meetings (other than in person) and Law Society guidance on virtual signing
- Amending documents pre and post execution
- The *Mercury* case
- Rule in *Pigot's* case and *Raiffeisen Zentralbank Osterreich AG*
- *Williams & Others vs. Redcard Ltd & Others*; *Garguilo and Ors*
- Warranties for authority
- Dealing with absence of authority

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at Harrington Law, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

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London      21 Oct pm

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£140 + VAT CLT Members/£300 + VAT Non-members

## Cloud Contracts - The Practical Guide to Drafting and Negotiating

**Hot  
Topic**

Intermediate | 3 hours CPD

Cloud computing dominates technology talk. This course is aimed at those advising cloud suppliers and their customers. It will provide you with a practical guide on how to draft cloud contracts and will cover the following:

- How can you keep data secure and comply with data protection legislation?
- What measures should you include in a cloud contract to ensure the service is reliable so that the customer's business doesn't fail?
- What approach should you take to a supplier's liability?
- What issues should customers and suppliers consider at the end of a contract?
- How to adopt the Cloud Industry Forum's best practice recommendations
- How to decipher cloud industry jargon
- Tips for negotiating cloud contracts

This course will be of benefit as a refresher to experienced practitioners and will provide useful guidance to those relatively new to cloud contracts.

Speaker: **Frank Jennings** is a partner and head of the commercial team at DMH Stallard LLP. He specialises in technology law, intellectual property rights and commercial contracts. Frank qualified in-house with a computer games subsidiary of Sony.

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London      22 Apr am

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£140 + VAT CLT Members/£300 + VAT Non-members

## Best Practice for IT and Outsourcing Contracts

Intermediate | 6 hours CPD

The failure to pay close attention to the nuances of IT contracts is a recipe for dispute. This course mixes the best practice in IT contracts with a review of outsourcing IT contracts. The course reviews some of the issues currently troubling customers, service providers and advisers, including:

### IT Contracts

- Key issues to consider in relating to the scope of the software licence;
- Ensuring robust acceptance testing
- Avoiding the traps related to the provisions dealing with upgrades, updates, new versions and new releases
- Understanding the various approaches to intellectual property
- Ensuring the technical/operational schedules align with the 'front-end' legals

### Outsourcing Contracts

- The appropriateness of post-contract verification
- Latest developments in limitations and exclusions of liability
- Getting the benchmarking provisions right
- Ensuring a balanced approach to step-in rights
- Best practice for contract renewals and exit management

Speaker: **Samitha De Silva** is a partner and is the head of the IT and Outsourcing practice at Manches LLP. He is recognised as a leading individual for IT in the most recent editions of the *Legal 500* and *Chambers & Partners* directories.

London 5 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

## Practical Competition Law: An Update on Competition Law for Commercial Lawyers **NEW**

Foundation | 3 hours CPD

This course provides a practical update and gives key guidance on competition issues to look out for in commercial contracts and business transactions.

The course will cover:

- Why worry about competition law at all?
- Dealers, distributors and competition law: dos and (some) donts
- What your clients can do with competitors (joint ventures, trade associations) and what they cant (cartels)
- What to do if you think your client may be dominant... and if your client is the victim of anti-competitive behaviour
- Update on topical developments

Speakers: **David George**, is a specialist in competition law with significant experience of contentious antitrust matters, including investigations by competition authorities and standalone private litigation in the English High Court. He also advises on the competition law aspects of commercial arrangements and on internal compliance programmes and **Osman Zafar** is a senior associate specialising in competition law, with a keen interest in the TMT sector. He has contentious and non-contentious experience, including work on international cartel investigations, advising on issues arising from standardised technologies, delivering compliance training, and merger control in the music, financial services, energy, consumer products and educational publishing sectors. Osman contributes regularly to the Computer Law and Security Review. He has recently taught competition law on the IP interface at the LSE, a subject which he also blogs about on Bristows' blog, 'The CLIP Board'.

London 24 Mar pm

£140 + VAT CLT Members/£300 + VAT Non-members

# Drafting Commercial Lasting Powers of Attorney **NEW**

Intermediate | 3 hours CPD

Company and Private Client Lawyers take heed! Legislative changes concerning company directors say; if they lack mental capacity they may not necessarily now be removed. This creates a quandary for a company, particularly their attitude to risk. Doing nothing could endanger the company; creating a Commercial LPA reduces the risk. Commercial LPA's can be used to manage decisions where a director is unavailable or away on business, just like an ordinary LPA or where they become incapacitated for longer periods of time or lack mental capacity.

This course will take solicitors through relevant company law; identifying business structures and drafting Commercial LPA's. Showing how different areas of law impact and how best to advise a company on making a Commercial LPA.

Topics covered:

- Personal & commercial LPA clashes
- Directors: problems and removals
- Taking instructions
- Checking & adjusting business structures
- Applying current case law
- Drafting a Commercial LPA

Speaker: **Craig Ward**, is a consultant solicitor and author. He has a degree in psychology and is a member of Solicitors For the Elderly and the British Psychological Society. He speaks internationally on elderly care law, mental capacity law, the Court of Protection and mediation. Craig mediates on commercial, probate and Court of Protection disputes and is the author of Who Cares (2012) Inspirational Press and Lasting Powers of Attorney: A Practical Guide (2nd Edition) (2011) The Law Society."

Manchester	16 Jun pm
Birmingham	17 Jun pm
London	18 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

# An Introduction to Data Protection and its Practical Application

**Best  
Seller**

Foundation | 6 hours CPD

Since failure to comply with requirements can result in criminal as well as civil liability, no organisation can afford to ignore the issue of data protection.

Practically all businesses operating in the UK which hold information about individuals (whether they be employees, customers or anyone else) are affected by data protection laws.

This course is aimed at lawyers in private practice, in-house and in local authorities and will also be of interest to data protection officers. It provides a practical guide to how data protection works and how the principles must be applied in a variety of contexts. It will also provide essential guidance on the new EU developments in data protection.

It includes:

- The key principles, obligations and rights under the Data Protection Act 1998
- Access Requests
- Information management and document retention policies
- Workplace and employment rights
- The role of the Information Commissioner and enforcement
- Dealing with breaches of the Act
- Practical preparation for increased safeguards after 2015

Speaker: **Richard Morgan** is an independent IT consultant. For many years he was Computer Officer at the two Houses of Parliament. He is a founder member and a past Chair of the Society for Computers and Law.

London	12 May
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£210 + VAT CLT Members/£450 + VAT Non-members

## 12 Tricky Data Protection Points

Intermediate | 6 hours CPD

Data protection law is hitting the headlines as organisations and individuals struggle with complex rules regarding the protection and sharing of, and access to, personal data.

This course examines topical issues in data protection law which will enable you to advise businesses and individuals with more confidence.

Topics covered include:

- What is personal data?
- Sharing confidential data
- Outsourcing supervision
- Customer lists and preference services
- Freedom of Information Act
- Collection notices
- Complaints and penalties

Speaker: **Sue Cullen** is a solicitor specialising in information law and director of Amberhawk Training Ltd. She was previously a member of the information law Team at Pinsent Masons LLP, and is an accredited trainer for the ISEB qualifications in data protection, FOI and IT Law.

Or **Dr Chris Pounder** is a director of Amberhawk Training Limited, which he founded with Sue Cullen in August 2008. He writes and edits the magazine, *Data Protection and Privacy Practice* and runs a data protection/foi helpline. He speaks and writes on data protection and related matters and has given evidence before various Parliamentary select Committees on issues of privacy, data protection and security.

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London      20 Apr

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£210 + VAT CLT Members/£450 + VAT Non-members

## Consumer Law Update 2015

**Hot  
Topic**

Update | 6 hours CPD

This is a time of considerable change and development in consumer law. The implementation of the Consumer Rights Directive heralds changes for all those providing goods and services, whether the contract is made on or off premises or at a distance. The demise of the Office of Fair Trading has also led to changes in the regulation of many activities. It is vital that practitioners advising retailers and manufacturers are up to date to avoid civil law, criminal law and regulatory problems and this course will explain the changes and other developments in consumer law.

Topics covered include:

- Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013
- Payment Surcharges Regulations
- Abolition of OFT
- Consumer Protection from Unfair Trading Regulations 2008
- Business Protection from Misleading Marketing Regulations 2008
- Undertakings and enforcement orders under the Enterprise Act 2002

Speaker: **Deborah Parry** is a freelance consumer law author and lecturer. She is Honorary Fellow of the Law School, University of Hull where she was a senior lecturer for 15 years. Deborah has contributed to programmes on Channel 4 (Dispatches), BBC (Panorama, Watchdog, Watchdog Daily and Your Money Their Tricks) and BBC Radio 4 on consumer topics. She edits and contributes to *Butterworths Trading and Consumer Law* and has written a number of leading texts and a wide range of legal papers on consumer law topics.

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London      23 Jun

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£210 + VAT CLT Members/£450 + VAT Non-members

## Insurance Law: A Practical Introduction

Foundation | 6 hours CPD

This course, which includes a practical case study, provides a useful introduction to the key principles of insurance law including:

1. Key concepts in insurance, such as good faith and indemnity
2. Formation of the standard insurance contract, considering proposal forms and policies
3. Formation of the insurance contract in the London insurance and reinsurance market, considering traditional documentation and documentation following market reform
4. How Lloyd's work
5. Construing insurance policies
6. Effect of important insurance terms, such as warranties and conditions
7. Insurers' entitlement to avoid insurance for material non-disclosure and misrepresentation
8. Resolution of disputes through the Financial Ombudsman Service, the courts or alternative dispute resolution, such as mediation

This course will include a practical case study which will deal with problems which frequently arise in insurance disputes.

Speaker: **Alison Green** is a barrister at 2 Temple Gardens. Alison specialises in insurance and reinsurance law. She is Vice President of the British Insurance Law Association and on the advisory panel to the Law Commission in relation to its review of insurance contract law.

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London      5 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

## 10 Tricky Points in Insurance Law

Intermediate | 6 hours CPD

This course reviews the most common difficult issues in insurance law, including:

1. When are insurers entitled to avoid insurance?
2. How far is there a continuing duty of good faith?
3. What if insurers are in breach of their duty of good faith?
4. Construing warranties and the effect of breach
5. Construing conditions precedent and the effect of non-compliance
6. When can insurers be said to have waived their rights?
7. When can insurers be estopped from relying on their strict rights?
8. Differences between insuring on joint and composite basis
9. Differences between insuring on a claims made and losses occurring basis
10. Raising fraud in insurance claims

This course will include a practical case study which will involve some of the issues considered above.

Speaker: **Alison Green** is a barrister at 2 Temple Gardens. Alison specialises in insurance and reinsurance law. She is Vice President of the British Insurance Law Association and on the advisory panel to the Law Commission in relation to its review of insurance contract law.

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London      17 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members



## IP and IT Law Update

**Hot  
Topic**

Update | 3 hours CPD

This course examines a broad range of issues and recent developments in IP and IT law with emphasis on the implications for IP/IT law practitioners.

It covers everything from patents, designing copyright and trade marks, confidential information and data protection with a round-up of all the key new cases and legislation. Topics covered include:

- Patents
- Confidential information
- Designs
- Trade marks
- Copyright
- Competition
- Data protection
- Freedom of information
- Information security
- Domain name disputes
- Regulation of investigatory powers
- News round-up
- The *Google Adwords* decision of the ECJ
- The *Lucasfilms* copyright decision
- The Digital Economy Act 2010
- The *BSkyB vs. EDS* decision

Speaker: **Lorna Brazell** is a solicitor advocate and joined the Intellectual Property Disputes group in Osborne Clarke's London office in 2013 to head up the patent litigation practice, bringing 19 years' experience in a wide range of technologies from her previous role at Bird & Bird.

London 14 Apr am

£140 + VAT CLT Members/£300 + VAT Non-members

## Overview of Digital and Social Media Law

**Best  
Seller**

Intermediate | 6 hours CPD

Digital media is not just maintaining a corporate website or even making products and services available but also setting up blogs, participating in forums and using Twitter, Facebook, LinkedIn and other sites.

This course gives an introduction and overview of the legal risks associated with all elements of digital and social media. It will be of interest to all commercial and corporate practitioners who do not deal with digital and social media law on a regular basis but need to have a working knowledge of it. It will also be useful to those joining the relevant department dealing with digital and social media law either in private practice or in-house.

It includes:

- Overview of social and digital media and key terminology
- Identifying key areas of risk with social and digital media:
  - Operational risks
  - IP and online infringement
  - Privacy and confidentiality
  - Data protection
  - Defamation
  - Other content liability issues

Speaker: **Sherree Westell** is a solicitor with over 20 years' commercial law experience with particular expertise in IT, digital and social media as well as IP. She now works as a consultant for Belgravia law firm, Woodroffes, on a range of IT, digital and social media projects.

London 4 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

# Understanding and Managing Intellectual Property Disputes

Foundation | 5 hours CPD

This course provides an introduction to intellectual property disputes. It is aimed at in-house counsel who need to understand how to manage IP disputes and also at litigators who are looking to develop their IP practice.

IP ‘Associate to Watch’ Martin Noble will identify how disputes arise and how to assess the strength of your own or an opponent’s position. It will also assist in formulating a strategy for dealing with the dispute. You will have the opportunity to work through practical case studies in order to see how IP law works in the real world.

Topics covered include:

- Assessing IP rights, their ownership and validity
- Pre-action and interim relief, including pre-action disclosure, Norwich Pharmacal orders and interim injunctions
- Letters before action
- ADR
- Issue of proceedings and statements of case
- Disclosure, witness statements
- Expert evidence
- Inquiry as to damages/account of profits
- Trial
- Costs

Speaker: **Martin Noble** is a legal director of Shakespeares Legal LLP. Martin has managed IP disputes across jurisdictions, in the English High Court, the Intellectual Property Enterprise Court and through ADR. He also advises on IP aspects of commercial deals and exploitation of rights.

London 16 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

# Certificate in Insolvency Law

Best Seller

Foundation | 6 hours CPD

This course is primarily aimed at practitioners in other fields who come across insolvent situations in their practice and wish to develop their knowledge and experience.

It will include:

- An introduction to the different insolvency regimes
- Using insolvency as a litigation recovery tool
- Pre-pack administrations
- Litigating for and against insolvency practitioners
- Piercing the corporate veil; getting at the directors personally
- Getting the most out of the insolvency practitioner
- Funding insolvency litigation

Speaker: **Stephen Allinson** is Chair of the Joint Insolvency Examination Board. He is a consultant with Lester Aldridge Solicitors as well as lecturing and presenting. He has for many years been recognised as a ‘leader in his field’ by legal directories. He regularly contributes to professional publications and has written a leading text on debt recovery.

London 8 Oct, 3 Dec

£210 + VAT CLT Members/£450 + VAT Non-members

## Insolvency and Asset Sales and 'Pre-Pack' Sale and Purchase Agreements

Intermediate | 6 hours CPD

This course provides a comprehensive guide to transactions involving troubled companies, including sale and purchase agreements and the particular issues which arise.

Topics covered include:

- The run up to insolvency and turnaround
- Administration: a challenge and an opportunity
- Sale agreements information and due diligence
  - Confidentially
  - Exclusivity
  - Areas outside control
  - Ransom payments
- The pre-pack sale
  - SIP16
  - The pre-pack in practice
  - *Hellas ii*

Speaker: **Philip Coates** is a former partner at Pinsents who now practises as a consultant. He specialises in insolvency law and practice and has practical experience of many turnarounds and restructuring for companies.

London      22 Oct

£210 + VAT CLT Members/£450 + VAT Non-members

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## Certificate in Employment Practice **NEW**

Foundation | 12 hours CPD

This two day workshop follows the lifecycle of employment from recruitment through to termination. Suitable for those with no knowledge or experience it aims to provide a practical understanding of all the key areas listed. Learning is reinforced by using case studies and small group discussions.

Day 1:

- Recruitment issues - the legal and practical considerations
- An overview of discrimination legislation and Equality Act 2010: age, sex, race, religion, disability, and sexual orientation
- Employment status
- Contracts of employment: terms required by law, common terms imposed by employers, variation
- Employment rights including maternity and the new additional paternity rights

Day 2:

- TUPE: a summary of the Transfers of Undertakings Regulations and the employment implications when selling or buying a business
- Managing attendance: a guide on handling absence problems fairly and within the law
- Discipline and grievance: a summary of the legal framework and a practical guide to investigating problems and dealing with them
- Termination of employment: dismissal and redundancy

Speaker: **Rosamonde Quincey**, BA Hons, FCIPD, is an experienced and practical HR consultant and has worked in the area of employment law and performance management for many years. Rosamonde is passionate that employment law should be better understood by employers to enable them to be “on the front foot” when correcting inappropriate behaviours or actions. Her clients include multi-nationals and SMEs and range from public to private sector.

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London

18 - 19 Mar, 23 - 24 Jun

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£495 + VAT CLT Members/£795 + VAT Non-members

## Employment Law 2015 Update

**Hot Topic**  
**Best Seller**

Update | 6 hours CPD

This 'must attend' course will examine the immense activity during the last 12 months; addressing the changes in case law and forthcoming proposed legislation.

Included in this will be an in-depth look at the surprising decision of the EAT regarding what constitutes an establishment for the purposes of collective redundancy consultation in *USDAW vs. Ethel Austin Ltd* and cases on:

- Employment status
- Rolled up holiday pay in light of *Larner* case
- Selection for redundancy
- Retirement issues post *Seldon*
- Reasonable adjustments in disability cases
- Other substantial reason dismissals
- Whistleblowing
- TUPE

Speaker: **Trevor Leuty** has been admitted as a solicitor for just over 40 years and is currently a consultant with Banks Kelly Solicitors Limited. He has developed a niche within the motor industry with a particular emphasis on employment law and practice.

Or **Gordon Menzies** is a barrister at the Chambers of Stephen Hockman QC, 6 Pump Court, Temple, London and acts for both claimants and respondents in all aspects of employment law.

Birmingham	4 Mar	London	25 Mar
Manchester	11 Mar		
Leeds	19 Mar		
Bristol	24 Mar		

£210 + VAT CLT Members/£450 + VAT Non-members

## Central Law Training Webinars

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Webinar/s	Members	Non Members
<b>1</b>	<b>£85</b>	<b>£170</b>
<b>4</b>	<b>£225</b>	<b>£450</b>
<b>10</b>	<b>£375</b>	<b>£750</b>
<b>20</b>	<b>£599</b>	<b>£1199</b>

*Terms and Conditions apply. All prices exclude VAT*

## Fitness for Work - Masterclass **NEW**

Masterclass | 6 hours CPD

This one day Masterclass will consider fitness for work in the context of the Government's Health, Wealth and Wellbeing initiative and its aims to:

- Improve the general health and wellbeing of the working age population
- Support more people with health conditions to stay in work or enter employment

Delegates will acquire the necessary tools to advise and effectively deal with the various categories of sickness absence including:

- Genuine but persistent absences
- Genuine chronic/acute long term sickness
- Fraudulent malingerer
- Lazy malingerer

Occupational health expertise is crucial in dealing with the issue of fitness for work and delegates will benefit from the viewpoint of an occupational health professional and can compare and contrast with the relevant legal issues, including proper implementation of policies and procedures, disability discrimination and reasonable adjustments, with an update of current and relevant case law.

Speaker: **Gillian Howard** is an employment lawyer, running her own practice, specialising primarily in employment law and occupational health. Gillian is an Honorary Fellow of the Faculty of Occupational Medicine, Royal College of Physicians and was on the Editorial Board of *Butterworth's Occupational Health Review*.

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London

21 Jul

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£310 + VAT CLT Members/£495 + VAT Non-members

## Discrimination - Practice and Procedure **NEW**

Intermediate | 6 hours CPD

At the end of this course those attending will have received a thorough grounding in the new tribunal rules and how to use them effectively in the complex area of discrimination claims. Many claims fail because the relevant evidence has not been elicited from the parties at an early stage of the litigation process.

The course will cover:

- How to get your claim started, the new fees regime and remission
- Making sure claim/defence is carefully pleaded to ensure you get through the new sift procedure
- Collecting and evaluating the evidence
- Preparing for preliminary hearings
- Drafting witness statements
- Tips for conducting the hearing
- Preparing for remedies hearing, mitigation, evidence of the market place, purpose of schedules and counter schedules

Speaker: **Susan Belgrave** has years of experience in the employment tribunals and higher courts. She has appeared in a number of high profile discrimination claims and is sought out by claimants and employers alike in this difficult area.

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**London**      **30 Jun**

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£210 + VAT CLT Members/£450 + VAT Non-members

## Solving TUPE Problems in 2015

Intermediate | 5 hours CPD

This 5 hour course examines common issues which arise before, during and after a transaction to which the TUPE Regulations apply and how to deal with them.

There will be a detailed look at recent case law including Tapere vs South London Maudsley NHS Trust, Hynd vs Armstrong, Dynamex Friction Ltd vs Amicus and Nationwide Building Society vs Benn and recent government proposals to amend the Regulations.

The course will include:

- The basic rules - when is a dismissal connected with the transfer? Whose reason is relevant? Who is employed "immediately before the transfer"?
- Reducing staff
- Changing terms and conditions of employment following a TUPE transfer.
- Can I amend the terms and conditions? Employee co-operation- what are the options?
- Whose ETO reason is relevant? Are unfair dismissals a nullity?
- Which employer is responsible?
- Compromise Agreements. Can a potential TUPE claim be compromised?

Speaker: **Trevor Leuty** has been admitted as a solicitor for just over 40 years and is currently a consultant with Banks Kelly Solicitors Limited. He has developed a niche within the motor industry with a particular emphasis on employment law and practice.

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**Manchester**      **14 Apr**  
**Birmingham**      **15 Apr**  
**London**      **22 Apr**

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£210 + VAT CLT Members/£450 + VAT Non-members

## Unfair Dismissal - A Practical Overview **NEW**

Foundation | 6 hours CPD

Unfair dismissal continues to be central to the work of the employment lawyer, whether advising or litigating. This course will cover the principles which underpin this area of the law, and put them into a practical framework, making use of problems, case studies and interactive discussion. It will deal with:

- constructive dismissal: including fundamental breach, factors causing the resignation, delay and the last straw doctrine
- continuity of employment: umbrella contracts and deemed continuity
- employment status: the written contract and the role of reality
- potentially fair reasons under the Employment Rights Act
- interpreting and applying the ACAS Code of Practice
- the band of reasonableness
- Polkey reductions and contributory conduct
- remedies: reinstatement and re-engagement, calculating compensation

If you want to have a thorough grounding of this important area of employment law, you should attend this course.

Speaker: **John Sprack** has 14 years' experience as an Employment Judge. He is an experienced CPD trainer. He was formerly Reader at City Law School where he taught employment law and advocacy for 11 years on the Bar course. He is the author of a number of employment law publications.

Birmingham	27 Apr
Leeds	29 Apr
London	6 May

£210 + VAT CLT Members/£450 + VAT Non-members

## Contractual Disputes: The Complete Picture

Intermediate | 6 hours CPD

This is a highly practical course which focuses on the opportunities and risks occurring in every day commercial contracts which underpin most civil disputes, making it a must for private practitioners and In-house lawyers whether negotiating, drafting or litigating on contract and commercial matters.

Topics covered include:

- The legal risks audit
- Avoid litigation - essential protective terms
- Incorporation of terms and life after the "battle of the forms"
- Avoiding challenges to the enforceability of settlements
- Entire agreement clauses, pushing them to the limit
- Compromise agreements: 3 simple rules
- Damages update, recent developments and calculation issues
- Liquidated damages and penalty clauses revisited, the use of a condition precedent
- Making time of the essence, the danger of the Union Eagle case
- Post termination restrictive covenants
- Language and punctuation
- Exclusions and limitations
- Contractual intent and enforceability including the danger of commencing work prior to "signing off"
- Discharge and terminating the contract and the exposure of wrongful termination
- Dispute resolution provisions and ADR clauses
- Traps for the unwary
- The solicitors' "must know" list of contract and commercial law principles.

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at St Ives Chambers, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

London	27 Feb, 5 Jun
Manchester	13 Mar
Birmingham	12 Jun

£210 + VAT CLT Members/£450 + VAT Non-members



## Conducting a Civil Claim from Start to Finish in the Post-Jackson Era

Foundation | 6 hours

This is a comprehensive and common sense course, concentrating on the practical aspects of conducting a civil claim. It is designed to give you a full understanding of how to conduct civil proceedings from start to finish and has been fully revised and updated to take account of the Jackson reforms. It will be particularly of interest to those who are new to litigation, in-house counsel and those returning from a career break.

The course includes:

- Initial instructions and steps • What to do next in protocol and non-protocol cases • Obtaining and preparing the evidence • A brief outline of costs issues • Negotiations and offers – the different options and tactics • Part 36 offers and payments – tactics and pitfalls • Statements of case and starting proceedings • The tracks and case management • Interim applications • Preparing for trial and trial procedure • Judgment and enforcement.

Speaker: **Andrew McLoughlin**, solicitor, has been granted Higher Rights of Audience for Civil and Criminal proceedings and sits as a recorder in the Crown and County Courts. Andrew has been described by a previous delegate as 'an extremely erudite and knowledgeable gentleman with a sharp sense of humour. An absolute joy to learn from. Truly outstanding'

London	11 Feb, 3 Jun
Manchester	12 Feb
Bristol	4 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## Getting to the Money - Proactive Debt Recovery in 2015

Update | 6 hours CPD

This course is aimed at civil litigators, debt recovery practitioners and paralegals who wish to enhance their understanding of the debt recovery process from taking instructions through to enforcement in the new regime.

It includes:

- Compliance and Regulatory Issues • Pre-action considerations: profiling the debt and the debtor • Possible defences • Limitation • Interest • Default judgments • Summary judgment/strike out • Costs and Part 36 offers • Enforcement: advantages and disadvantages of different remedies • Insolvency procedures: when to use and when to avoid • Recent reforms and case law.

Stephen Allinson has a proven track record in establishing a successful, nationally recognised debt collection practice and will provide advice on marketing, developing and building a debt recovery practice. You will have the opportunity to apply your knowledge through practical group exercises and leave confident and ready to put into practice what you have learnt.

Speaker: **Stephen Allinson** is Chairman of the Joint Insolvency Examination Board. He is a Consultant with Lester Aldridge Solicitors as well as lecturing and presenting. He has for many years been recognised as a 'leader in his field' by legal directories. He regularly contributes to professional publications and has written a leading text on Debt Recovery.

London	13 May
Leeds	27 May

£210 + VAT CLT Members/£450 + VAT Non-members

# An Overview of Commercial property for Non-Lawyers **NEW**

Foundation | 6 hours CPD

This course is designed for property managers, investors, commercial surveyors, estates managers, and non-legally qualified staff. It will also be of interest to paralegals who intend to work in commercial property.

The course will give a jargon-free and understandable introduction to the key concepts and issues involved in buying, selling, leasing, or developing commercial property:

- Jargon buster - what are the key words and phrases you need to know
- Big Picture – the role of the various property professionals
- Process of buying freehold property demystified
- Basic Land law guide including - easements - rights - covenants – what are restrictive covenants? - role of the Land Registry
- Mortgages and Facility agreements
- Property Development, Options, Site Promotion Agreements and Conditional Contracts
- Overage - are you feeling lucky?
- The difficulties of making sure you get your overage
- Ransom strips, rights of light, and other nightmares
- Commercial Leases - key points to watch out for on leases including: - Repairing obligations - Restrictions in the lease on use, alterations and sales or underlettings - Service charges - What land is included in the lease? - Break clauses - Guarantors and rent deposits
- Security of Tenure for commercial/business leases - rights to a new lease/when can the landlord refuse?
- Stamp Duty Land Tax - why you have to treat it with as much care as your Income Tax or VAT return.

In addition to the course notes there will be a series of checklists, flowcharts and “main problem areas” sheets.

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putsman wlc and an associate at Pinsents - specialising in property development, development finance and environmental law.

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London      23 Apr

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£210 + VAT CLT Members/£450 + VAT Non-members

# Commercial Property Update 2015

**Best  
Seller**

Update | 5 hours CPD

This key course has earned its well deserved reputation for being an absolute ‘must’ for busy practitioners to keep up-to-date.

It covers a huge range of recent and pending commercial property law and practice changes. It provides an analysis of the legal developments and always considers these in the light of the practical implications for day to day practice.

[Content is subject to change from time to time, in order to ensure that the most important recent developments are included.]

Topics will include:

- Flood insurance: *Flood Re*
- Beach - Registration as a Town and Village Green?
- Registered Charges and Facility Agreements
- Easement by Estoppel
- Extent of Solicitors' Liability in Redeeming Charges
- Guarantor's Obligation to Take New Lease on Insolvency

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

Or **Professor Peter Reekie**, Property Training Consultant with Penningtons Manches LLP and also Visiting Professor at the University of Law.

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Leeds	5 Feb
London	11 Feb
Birmingham	12 Feb
Newcastle	18 Feb

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£210 + VAT CLT Members/£450 + VAT Non-members

# Certificate in Planning

**Best  
Seller**

Foundation | 12 hours CPD

This two day course introduces delegates to the essential aspects of planning law and focuses on those areas which are particularly pertinent to commercial property and planning lawyers. It is aimed at those who have no (or very little) knowledge of the topic but are joining the planning group within a Firm or are commercial property lawyers called upon to advise on planning issues as part of commercial property transactions. It is also ideal for those who have some experience in the field and need an update following significant changes to the planning regime in the past few years.

Learning is reinforced by case studies and discussion

## Day 1

- Why do we have planning? Origins of the modern system and the Town and Country Planning Act 1947
- The current legal framework – the Town and Country Planning Act 1990, Planning Act 2008, Localism Act 2011, Growth and Infrastructure Act 2013
- Why do we need planning permission? Exceptions to the need for planning permission
- Outline permission and full permission
- Permitted development rights, general, special and local development orders, enterprise zones and simplified planning zones
- Applying for planning permission and the criteria for the decision
- What is the development plan? How is it created? The role of the public
- What are “material considerations” and what is the role of Government policy?
- Supporting documents and processes: design and access statements
- Environmental impact assessment
- Decision periods, rights of appeal and Judicial Review
- High Court and Secretary of State respective supervisory roles

## Day 2

- Conditions
- Section 106 agreements
- Community Infrastructure Levy

- The duration of planning permission
- Enforcement of planning control
- Time limits for enforcement, and concealed breaches
- Listed Building Control
- What is a listed building?
- What does a listing look like?
- Conservation area control
- How is it different in the Green Belt, Areas of Outstanding Natural Beauty and World Heritage Sites
- Nationally Significant Infrastructure Projects: the process under the Planning Act 2008
- Granting planning permission by a Hybrid Bill - Crossrail, HS2 and CTRL
- The National Planning Policy Framework
- What next? A preview of possible reforms

Speaker: **David Brock** is an author, lecturer, and retired planning solicitor. He worked for over 30 years in planning law on major projects such as Canary Wharf, Kings Cross, Whatley Quarry, Cambourne New Settlement, Channel Tunnel Rail Link, East Kettering Sustainable Urban Extension and the Rookery South energy from waste project. He is a former partner of both Herbert Smith (now Herbert Smith Freehills) and Mills & Reeve. David is the immediate Past Chair of the Law Society's Planning and Environmental Law Committee and has written extensively on the need to reform and simplify planning. He now heads Brock Consulting, where he writes, speaks and chairs conferences on a range of subjects from modern art to law.

<b>London</b>	<b>11 - 12 May</b>
<b>Manchester</b>	<b>21 - 22 May</b>

£495 + VAT CLT Members/£795 + VAT Non-members

### Project Management for Transactional Lawyers

Intermediate | 6 hours CPD

Running a transaction requires operational efficiency based on first class organisational skills. Clients appreciate a lawyer who runs their matter smoothly and effectively. Quality project management ensures that you achieve the right outcome for your client with maximum efficacy.

This course will demonstrate the benefits of running a project successfully. It will enable delegates to acquire tips, techniques and tools for use in seeing a matter through with procedural smoothness from instructions to final bill.

Participants will use a current matter of their own (no files needed) as an action learning case study throughout the course.

Course content:

• The nature of a project • Benefits of project management • The stages and phases of a project • Client instructions and scoping • Setting parameters • Planning the project • Work breakdown and task analysis • Resource allocation • Setting timelines • Using GANTT charts to control task activity and work flow • Monitoring the process • Stakeholder management • Risk assessment and safety nets • Final review and signing off • Feedback session.

Speaker: **Martin Richardson** is a lawyer who began his career as a legal academic before moving to the City and the former Berwin Leighton to set up and run the firm's first professional development programme.

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London 17 Mar

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£210 + VAT CLT Members/£420 + VAT Non-members

### Understanding and Interpreting Company Accounts

Foundation | 6 hours CPD

Introduction to accounting concepts, including:

- Small and medium company thresholds, audit exemptions, where non-corporate entities fit
- UK GAAP: the framework
- IFRS: who it applies to and the framework
- Examples of differences between UK GAAP and IFRS
- The future of UK Financial Reporting: FRS 100,101 and 102 and the potential impacts.
- Contents of financial statements - Profit and loss account - Balance sheet
  - Cash flow statements - Discussion of why profit does not always mean cash
  - Overview of other statements, notes etc.
- Group accounts - Introduction to basic group accounting principles - Consolidation of overseas subsidiaries - How to account for an acquisition What is goodwill and what do we do with it? - Associates and joint ventures - Merger accounting.
- Tricky and judgemental areas - Fixed assets - depreciation and revaluation - Stock - costing and provisions - Bad debt provisions - Provisions and contingent liabilities - Leasing - Revenue recognition - Defined benefit schemes - Share based payment.
- Valuation and deal issues - Common methods of valuing companies - Focus on EBITDA - what does it mean? - Enterprise value and cash-free/debt-free.
- Dividends and distributions - Interaction of accounting and law - What are realised profits and losses? - Practical issues when declaring dividends.

Speaker: **Martin Howard** is Hazlewoods' Technical Partner and has spent much of his career working with corporate clients, providing advice in the areas of audit, corporate tax, management accounting and general business. He has worked on a wide variety of clients in many different industries including manufacturing, tourism, construction, distribution and the charity and not-for-profit sector.

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London 3 Feb, 2 Jun

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£210 + VAT CLT Members/£420 + VAT Non-members

**Best  
Seller**

## Managing and Motivating People

Intermediate | 6 hours CPD

Designed for staff with responsibilities within a legal environment (or for those about to undertake them), this course provides an overview of the key issues to be understood to manage people well in a rapidly changing environment.

For law firms, people are the most important and most costly investment made. It is therefore vitally important that all 'people managers' understand a range of tactics and methods to ensure that the firm not only maximises its return on the investment but also creates a culture within which staff are happy and want to play their part in achieving the firm's goals.

This practical and interactive course takes the fear out of managing people and explores the following key areas:

- What is different about law firms?
- Common goals, values and standards
- Motivating people
- Leadership and teams effective delegation coaching and development
- Performance management and 'difficult' people
- Managing change

Speaker: **Keith Harper** is Managing Director of Harper Professional, and is a management consultant and trainer who works solely with law firms. He has 15 years' experience of successfully advising and training a wide range of clients from global businesses to small partnerships. From previous senior roles in industry, and the professional services sector, Keith has gained a wealth of experience of management issues, and specifically of the role of management within the legal environment.

London	19 May
Manchester	21 May

£210 + VAT CLT Members/£420 + VAT Non-members

## Negotiation Skills Improvement Workshop

Intermediate | 6 hours CPD

Everyone negotiates; not everyone negotiates well. Improve your own skills through this interactive workshop which develops the practical skill of the delegate through a series of case studies. As a result of participation throughout the sessions you will gain an improved negotiation technique.

The course is suitable for lawyers, business managers and other professionals.

Topics covered include:

- Preparing effectively for face to face negotiation and meetings and understanding how the theory can change your practice
- Implementing and identifying different negotiation strategies
- Dealing with tactics from the other side
- How to avoid deadlock
- Controlling the agenda
- Spotting professional conduct problems
- Putting forward an effective argument
- How to be persuasive
- How to make rational and measured concessions
- Managing a client's expectations and benchmarking and dealing with 'terrorists'

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at St Ives Chambers, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

London	29 May
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£210 + VAT CLT Members/£420 + VAT Non-members

### Management Course Stage 1 for In-house Lawyers

Foundation | 7 hours CPD

This course caters for those who have trained or moved in-house and are required to take Management Course Stage 1.

It has been designed and is run by presenters from Lawyers in Business who have extensive in-house experience.

#### Understanding your client

• Why are they using you? • How do the pressures they are under affect you? • How should expectations be managed? Dealing with the demands for your services.

#### Building relationships

• Integrating while maintaining integrity • Persuasive communications • Concentrating on what matters • Dealing with unpalatable situations

#### Managing colleagues and yourself

• The challenges of motivation • Recognising the vital contribution of support staff • Teamwork and management styles • Vital time management • Managing legal services • Objective setting and personal development • Information capture and retrieval • The vulnerable parts of budgets.

#### Mobilising external advisers

Speakers: **Mark Prebble** worked for 20 years as an in-house lawyer for companies in the UK and Europe. In 1998 he left The BOC Group plc where he was Group Legal Adviser, to set up Lawyers in Business, an organisation dedicated to support and develop in-house lawyers.

London 17 Mar

£150 + VAT CLT Members/£435 + VAT Non-members

Best  
Seller

### Management Skills for Leaders of In-house Legal Teams (Management Course Stage 2)

Advanced | 6 hours CPD

This course meets the needs of those who are managing an in-house team or have aspirations to do so.

It complements Management Course Stage 1 for In-house Lawyers which provides an orientation for in-house lawyers in the early stages of their career (and was previously called Management Course Stage 2).

If you are new to a management role, this course will provide you with the training you need. If you are an experienced manager, it will provide calibration that you are on the right track or a stimulus to adapt your approach.

Topics covered include:

- Business strategy for the legal department
- Client relationship management
- Managing and developing the in-house legal team

Speakers: **Mark Prebble** worked for 20 years as an in-house lawyer for companies in the UK and Europe. In 1998 he left The BOC Group plc where he was Group Legal Adviser, to set up Lawyers in Business, an organisation dedicated to support and develop in-house lawyers and **Anthony Inglese** was the top lawyer at five government departments before his retirement. His last legal department won two awards in 2013 for Best In-House Public Sector legal team of the year.

London 12 May

£210 + VAT CLT Members/£420 + VAT Non-members



*This was an excellent course, very useful*



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## A Year of Change: Key IP Cases in 2014

This webinar is aimed at in-house and private practice IP lawyers representing organisations and clients across all industries. It will highlight and comment on a selection of key English and European IP cases of 2014, including trade marks and passing off, copyright, designs and patents.

Speaker: **Ben Mark** is a senior associate in RPC's IP team. Ben advises on all aspects of intellectual property protection and enforcement, with a focus on trade marks, copyright and designs. Ben works with clients across a wide range of industries, including retail, online/e-commerce, financial services and insurance.

27 Feb | 1.00pm - 2.30pm

## Insider Dealing

The offence of insider dealing continues to attract attention, perhaps because of the very personal nature of the circumstances surrounding the commission of any offence. The statutory provisions which outlaw relevant forms of behaviour are complex and have not always seemed suitable for securing convictions where criminality has appeared obvious. Electronic trading systems and the possibility of dealing in very short time spans have made factual analysis potentially more difficult.

Speaker: **Mark Cardale** is a corporate lawyer and worked for many years with Slaughter and May. He acquired an interest in corporate governance while head of the firm's then New York office during the era of Enron and other corporate accounting scandals in the US.

6 Feb | 1.00pm - 2.30pm

## The Reverse Burden of Proof in Discrimination Claims

In *Dresdner Kleinwort Wasserstein Ltd v Adebayo Cox J* referred to the "insidious nature of discrimination." It was for that reason that the Courts introduced the concept of the reverse burden of proof. This is now given statutory effect in s136 Equality Act 2010. The Court of Appeal have said that the same principles apply in a whistleblowing case.

Speaker: **Trevor Leuty** has been admitted as a solicitor for just over 40 years and is currently a consultant with Banks Kelly Solicitors Limited. He has developed a niche within the motor industry with a particular emphasis on employment law and practice.

5 Mar | 10.00am - 11.30am



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### Which Law Applies?

With increasing frequency, international parties are litigating in English courts, just as our own companies and their management are being pursued in foreign settings. With the globalisation of trade and the ease of foreign travel choice of law has assumed an enhanced significance. Knowing your way around the two Rome Regulations and English common law in this area has become important knowledge for legal advisers in the UK.

Speaker: **Ian Gascoigne** is a solicitor and a partner of Eversheds LLP in its commercial dispute resolution group. He handles most forms of commercial litigation and has considerable experience of international arbitration. He trains lawyers on a variety of litigation subjects.

23 Jan | 1.00pm - 2.30pm

### Whistleblowing - A Practical View

Whistleblowing has been an important part of major corporate governance scandals, from Enron through to this summer's accounting problems at Tesco; but it also has many implications for companies and other organisations on a day-to-day basis. Information technology has vastly increased the amount of information available to employees, and the scope for its misuse, without necessarily making easier the discovery and appropriate reporting of issues within an organisation.

Speaker: **Mark Cardale** is a corporate lawyer and worked for many years with Slaughter and May. He acquired an interest in corporate governance while head of the firm's then New York office during the era of Enron and other corporate accounting scandals in the US.

20 Feb | 1.00pm - 2.30pm



“

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Speaker: Ben Mark

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Speaker: Tony Sampson

## **Advising Directors of Failing Companies**

Speaker: Tony Sampson

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Speaker: Keith Lewington

## **Clicks and Mortar: Intellectual Property for Retailers**

Speaker: Robert Cumming

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## **Competition Law: Dawn Raids**

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## **Consumer Remedies - New B2C Contracts**

Speaker: Helen Swaffield

## **Damages in Contract Law: A Refresher and Update**

Speakers: Chris Bryden and Michael Salter

## **Disaster, Frustration and Force Majeure**

Speaker: Simon McArdle

## **Distance Selling Regulations: The 2014 Changes**

Speaker: Helen Swaffield

## **E-contracting: A Refresher and Update**

Speaker: Helen Swaffield

### Employment Status - The Shifting Scene

Speaker: John Sprack

### Enforcement of a Judgment: The new Regime 6 months on

Speaker: Stephen Allinson

### Essential Contract Law Update Autumn 2014

Speaker: Helen Swaffield

### FCA Enforcement: Lessons from the First Year

Speakers: Victoria Lindsay and Elaine Penrose

### In-House Practice and the SRA

Speaker: Tracey Calvert

### IP Enforcement in The Era of Social Media

Speaker: Rosie Burbridge

### Misconduct Dismissals – Fair or Not?

Speaker: John Sprack

### Penalty Clauses after Makdessi: a Re-formulation of the Dunlop Test

Speaker: Helen Swaffield

### Personality Conflicts

Speaker: Gordon Menzies

### Settlement and Compromising claims

Speakers: Chris Bryden and Michael Salter

### Signature and Execution of Documents: a Refresher

Speaker: Helen Swaffield

### Specsavers vs. Asda: Anatomy of a Trade Mark Dispute

Speaker: Antony Gold

### Statutory Demands and Winding Up Petitions - The Inside Track

Speaker: Jeremy Richmond

### Whistleblowing

Speakers: Chris Bryden and Michael Salter

### Zero Hours Contracts

Speaker: Catherine Wilson



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# COLPs, COFAs and Managing Compliance 2015

Foundation | 5 hours CPD

Attendance at this course will be helpful for those stepping into either of the reporting officer roles by way of replacement, to those firms applying to the SRA to vary their current status, or to anyone seeking to establish a new practice. In all cases the ability of the firm and the proposed office holders to meet their obligations is likely to feature in the information that will be required.

This highly practical course will explain the background to the reporting officer roles introduced by the SRA Authorisation Rules and how the relationship with the regulator needs to be managed. The session will also cover guidance on how to compile suitable compliance materials and feature any up-to-date developments at the time of the course.

Topics covered include:

- The roles of COLP and COFA - an explanation or reminder
- Compliance materials and reporting obligations
- The Code of Conduct and the Accounts Rules - likely breaches
- The duties to monitor, record and possibly report
- Compliance update

Speaker: **Matthew Moore** is the Director of Consultancy Services with Infolegal Ltd – specialist compliance and practice management advisers to the legal profession – and is also a consultant solicitor with the regulatory specialists Jayne Willets & Co.



*I enjoyed the course. Really well presented*



Birmingham	21 Apr
Manchester	29 Apr
Derby	13 May
London	20 May

£210 + VAT CLT Members/£420 + VAT Non-members

# Money Laundering: Building a Compliance Culture

Update | 6 hours CPD

With the prospect of a Fourth Money Laundering Directive being adopted in early 2015 with implementation in the UK expected in early 2016, the SRA's concerns about legal practices' compliance with their AML obligations and the NCA's guidance issued in September 2014 the AML challenges faced by legal practices show no signs of abating. The SRA's Risk Outlook (2014) highlights money laundering as a current priority risk, with further guidance issued in November 2014. Do your employees understand and spot the warning signs? Are your systems/controls effective and "fit for purpose"? How do you embed compliance into your culture?

This course explores these issues, covering:

## Fourth Directive

- Timetable • What will it look like? • What next?

## POCA: A practical perspective

- Criminal property: width of the definition • Suspicion: *da Silva* test
- Arrangements: *Bowman vs. Fels* still relevant? • Risk factors • Privilege: how do you assess? • Reporting and tipping off: risks and realities.

## MLR: The challenges

- MLRO: appoint the right person • Identifying, managing and mitigating risk
- CDD challenges • PEPs – what to consider? • Source of funds/wealth • Beneficial owners • Ongoing monitoring • Demonstrating compliance • Communication/training • Monitoring • Horizon scanning.

Speaker: **Alison Matthews** is a leading UK expert on money laundering and chaired the Law Society's Money Laundering Taskforce until August 2012. She has advised on money laundering for 20 years (10 years as the MLRO at a top 20 law firm) and spent 12 years in Professional Ethics (SRA).

Leeds	21 Apr
Birmingham	28 Apr
London	13 May

£210 + VAT CLT Members/£420 + VAT Non-members



## Developing and Implementing Effective Client Care Practices

Intermediate | 6 hours CPD

The course will provide you with an understanding of why client care is essential to running a successful firm.

It also provides a practical framework for setting up and implementing a working client care system, and to develop the skills needed to communicate effectively with clients in order to underpin and develop client relationships.

Topics covered include:

- Why client care is important • Marketing quality - branding and kite marks
- The PCC core principles and Chapter 1 • Benchmarking service excellence
- Client profiling • Analysing current client care practice • Developing a client care plan • Delivering a quality service - CRM systems, SLAs and other key issues • Clients as stakeholders • Communicating with clients - the how and when • Holding conversations and influencing skills • Managing expectations • Dealing with difficult interactions - handling complaints and criticism • Ensuring win:win outcomes.

Speaker: **Martin Richardson** is a lawyer who began his career as a legal academic before moving to the City and the former Berwin Leighton to set up and run the firm's first professional development programme.

London 13 May

£210 + VAT CLT Members/£420 + VAT Non-members

## Mortgage Fraud Avoidance and Money Laundering Update for Property Lawyers

Intermediate | 3 hours CPD

**This course counts as update training as required by the Money Laundering Regulations 2007.**

The risks to conveyancers from unwitting involvement in mortgage fraud transactions include liability for lenders' claims and Land Registry losses, professional censure by the SRA under the Code of Conduct, and even criminal proceedings under the Fraud Act 2006 and the Proceeds of Crime Act 2002.

This highly practical course weaves together the various strands of statutory and regulatory risk in property work, and provides insights to the strategies that all firms need to adopt in order to achieve effective risk management in their firms on these issues.

Mortgage fraud is one of format of criminal conduct, and thus one of the forms of money laundering that firms are most likely to encounter. The special considerations for conveyancers in this regard are also covered.

This course therefore counts as update training as required by the Money Laundering Regulations 2007 and will cover:

- Defining the risks faced by property lawyers • Mortgage fraud indicators from the Law Society and the CML • The true scope of identity checking obligations under the MLR 2007 so as also to satisfy the Land Registry and lenders • The reporting regime under POCA 2002 and the Terrorism legislation – how does privilege apply to conveyancers? • Forms and procedures to counter the risks

Speaker: **Matthew Moore** is the Director of Consultancy Services with Infolegal Ltd – specialist compliance and practice management advisers to the legal profession – and is also a consultant solicitor with the regulatory specialists Jayne Willetts & Co.

London 14 May pm

£140 + VAT CLT Members/£280 + VAT Non-members

## SRA Accounts Rules: Achieving Compliance

Intermediate | 5 hours CPD

Don't get caught out by the new requirements as the consequences of non-compliance can be severe.

Topics covered include:

- The key principles behind the SRA Accounts Rules and the responsibility for compliance
- An overview of the SRA Accounts Rules and changes brought about by the 2011 Rules
- Common breaches of the rules
- The role of the COFA and guidance on reporting to the SRA
- A guide to key systems and controls, including bank reconciliations and client file reviews
- Dealing with profit costs, disbursements and VAT
- Common compliance failings
- Other hot topics, including how to spot fraud and prevention considerations

Speaker: **Andrew Harris** is a director in Hazlewoods' legal team and works exclusively with solicitor clients. Andy is very experienced in all aspects of advising legal practices and has a particular expertise in offering advice on management reporting and performance issues, and also practice structures.

London      26 Feb

£210 + VAT CLT Members/£420 + VAT Non-members

## SRA Accounts Rules for Accounts Staff

Intermediate | 6 hours CPD

This interactive course is suitable for a range of staff dealing with client money and will equip you with updated know-how and skills to provide effective support for busy practitioners.

The course is aimed primarily at accounts and finance staff, but is also a useful background for practice compliance officers.

The course includes:

- The 2011 SRA Accounts Rules, including key definitions and the detailed rules for accounting for client money
- The book-keeping requirements of the SRA Accounts Rules
- The guidelines issued by the SRA, showing best practice for implementation of the rules
- A case study
- Common breaches of the rules - our experience of common mistakes, how to spot them and how to avoid them
- The role of the COFA and what you should be doing to help
- A guide to key systems and controls, including effective bank reconciliation preparation and review
- Dealing with profit costs, disbursements and VAT.

Speaker: **Ian Johnson** is a senior manager in Hazlewoods' legal team and works exclusively for solicitor clients. He is very experienced in all aspects of advising legal practices and has a particular expertise in offering advice on management reporting and performance issues.

London      18 Jun  
Leeds      25 Jun

£210 + VAT CLT Members/£420 + VAT Non-members

## Cash Flow in Law Firms: The Essential Guide to the Essential Resource

Intermediate | 6 hours CPD

Managing partners and finance directors of law firms regularly say that cash flow is their biggest concern. Hardly surprising, since they know that without cash, businesses die. Even profitable ones. Even seemingly very profitable law firms.

Law firms, partners and the legal press obsess about profit, but pay far less attention to cash flow - and yet as one American author wrote, "every major law firm which has gone under had plenty of profit right up to the day it died".

How can this be? Lawyers may assume that profit and cash flow should be the same, or similar, but accountants understand that this can be far from the truth. Hence the saying, "profit is an opinion, cash is reality". With a well-managed focus on cash flow, successful firms go from strength to strength, and struggling ones can buy themselves time to recover their situation.

Law firms are cash-hungry businesses - far more than they need to be!

Whatever your challenges - sustaining success or struggling to survive - this oneday course will enable you to transform your firm's appetite for cash, both with tools and techniques you can implement immediately, and more far reaching strategies which can provide security and peace of mind for the longer term.

Speaker: **Barry Wilkinson** specialises in helping medium-sized Law Firms to improve their business performance. He is best known as "One of the few non-lawyers who can make Lawyers sit up and listen" and for his ability to help "Human-sized" Law Firms improve Cash Flow, Profits and Satisfaction. He is the author of *Cash Management for Law Firms* (Ark 2014) and the founder of Wilkinson Read and Partners.

London 15 May

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# Two-day Law Firm Management Masterclass

Advanced | 12 hours CPD

This is a comprehensive two day Master Class in law firm management designed to provide essential training in the core management areas of legal practice for partners and other senior lawyers with a management role in their firms, for non-lawyer managers in legal practice, and for those seeking to set up their own practices. It will satisfy the requirements of the Solicitors Regulation Authority for those requiring 12 hours' management training in order to supervise a practice.

The course will be delivered in four half-day sessions, which include practical case studies and discussion groups, over a two-day period. It is presented by CLT's highly experienced speakers in law firm management, all of whom have held senior management positions in leading law firms.

What you will learn:

- Session 1: Law firm strategy – to gain your competitive advantage
- Session 2: Profiting from practice: financial management
- Session 3: Getting the best out of people
- Session 4: Leadership, strategic implementation and risk

The SRA Handbook and Chapter 7 of the SRA Code of Conduct makes the effective management and supervision of a firm a matter of professional conduct. This requires partners to be able to demonstrate that their firms have effective systems and controls in place to achieve and comply with every requirement of the SRA Handbook. This course will help you meet this requirement.



Speakers: **Peter Scott** is a solicitor and former Managing Partner of Eversheds London and European offices. He acts as an adviser and coach to many law firms in the UK and abroad in relation to their financial, strategic, performance, compliance and business development issues and **Charlotte Points**, BA, MSc, Chartered FCIPD, an independent HR and training consultant, has worked with the legal profession over many years both in-house, as Head of Training and Personnel, and in a consultancy role and **Simon Smith** is a non practising solicitor and management consultant. He is a highly experienced and creative law firm leader with a strong commitment to strategy and the practical measures required to support partners and staff through the 'change' process. Simon has been running law firms since the mid 1990's, including East Anglian firms Buckles LLP and Ashton KCJ. He is currently working with leading Lincoln based firm Andrew & Co LLP. He has also been a long serving director of Lawnet, the national network of quality assured law firms.

“ **Excellent course - very practical and thought provoking. Taking away several important ideas that I will be implementing via my Management Board** ”

London

27 - 28 Apr

£495 + VAT CLT Members/£835 + VAT Non-members

## Management Course Stage 1

**Best  
Seller**

Foundation | 7 hours CPD

The Regulation Authority's compulsory management training course which all solicitors below 3 years' PQE must attend.

It is also a useful introduction to many core management techniques for more senior lawyers who have not previously undertaken formal management training.

The course covers the basic principles in areas such as:

- Understanding the environment for legal practice • Managing law firm finance
- Client care and managing people (organisation, motivation, delegation and dealing with underperformance).

Speaker: **Charlotte Points**, BA, MSc, Chartered FCIPD, an independent HR and training consultant, has worked with the legal profession over many years both in-house, as Head of Training and Personnel, and in a consultancy role.

Or **Damon Swindell**, BA (Hons) has worked with hundreds of private practice firms for many years advising and assisting on a range of management issues. Previously head of a national solicitors network, he is now concentrating on risk management. Damon is also a Law Society approved Adviser for the Lexcel Standard.

Or **Jane Walmsley**, BA, AMITD, is a trainer and a CEDR registered and accredited mediator. She has been working with and training solicitors since 1990 and previously worked for the Norton Rose M5 Group. She specialises in communication and management skills training, particularly presentation and negotiation skills.

Or **David Watts**, Higher Rights Advocate, formerly a solicitor with the CPS and in private practice. He is a member of CLT's PSR and CLAS Assessment Board as an assessor.

London	23 Jan, 6 Feb, 26 Feb, 20 Mar
Manchester	17 Feb

£150 + VAT CLT Members/£435 + VAT Non-members

## Management Course Stage 1 for In-house Lawyers

**Best  
Seller**

Foundation | 7 hours CPD

This course caters for those who have trained or moved in-house and are required to take Management Course Stage 1.

It has been designed and is run by presenters from Lawyers in Business who have extensive in-house experience.

### Understanding your client

- Why are they using you? • How do the pressures they are under affect you? • How should expectations be managed? Dealing with the demands for your services.

### Building relationships

- Integrating while maintaining integrity • Persuasive communications
- Concentrating on what matters • Dealing with unpalatable situations

### Managing colleagues and yourself

- The challenges of motivation • Recognising the vital contribution of support staff
- Teamwork and management styles • Vital time management • Managing legal services • Objective setting and personal development • Information capture and retrieval • The vulnerable parts of budgets.

### Mobilising external advisers

Speakers: **Mark Prebble** worked for 20 years as an in-house lawyer for companies in the UK and Europe. In 1998 he left The BOC Group plc where he was Group Legal Adviser, to set up Lawyers in Business, an organisation dedicated to support and develop in-house lawyers.

London	17 Mar
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£150 + VAT CLT Members/£435 + VAT Non-members

# Management Course Stage 1 for Local Authority and Public Sector Lawyers

Foundation | 7 hours CPD

Solicitors in legal practice or employment, admitted after 1st November 1995, must have attended Management Course Stage 1 by the end of their third CPD year. Management issues are vital for today's solicitor. Legal knowledge is not enough to ensure their success in what is now a very competitive profession.

This course is specifically tailored for solicitors working in the public sector and will provide an essential introduction to the many and varied management techniques required to be able to practise in the current market. Delegates participate in a workshop-based course covering:

- Managing the legal services department - administering the office and case - management systems
- Managing client relationships - assuring quality - meeting specifications - handling complaints - establishing and agreeing client - requirements
- Managing information - obtaining and evaluating information - presenting information and advice - communicating effectively
- Managing people - job descriptions - developing individuals - training and development - setting objectives - giving feedback - developing teams - allocating work
- Managing finance - ensuring profitability - control of working capital - measuring performance

Speaker: **Geraldine Gee**, LL.M, FRSA, Solicitor. Since qualifying in 1994 Geraldine has practised in local government and the public sector and is a monitoring officer and senior manager.

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London	10 Mar
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£150 + VAT CLT Members/£435 + VAT Non-members

# Introduction to Law Firm Management **NEW**

Foundation | 6 hours CPD

Based on the very successful Management Course Stage 1; this course is designed for solicitors, legal executives and other qualified lawyers as an introduction to the keys areas involved in the management of the business of providing legal services. Even for those not yet involved in management, it is important to have an understanding of the workings of the delivery of sustainable legal services. This course provides a foundation for those planning to go into management and/or attend Advanced Law Management [Management Course Stage 2] or the Law firm Management Masterclass. Attendance on this course will also provide 6 hours towards the SRA's 12 hour management training requirement for those who supervise a practice or are about to take on that responsibility.

This course will cover:

- Strategic Planning & Risk Management – understanding the big picture regarding the factors affecting the provision of legal services in the future
- Financial Management – understanding the issues affecting the sustainability of providers of legal services in a challenging environment
- Client Relationship Management – managing expectations through effective communication with clients
- Managing People – managing the performance and behaviour of those involved in providing legal services through effective team working, motivation and supervision.

Speaker: **Damon Swindell**, BA (Hons) has worked with hundreds of private practice firms for many years advising and assisting on a range of management issues. Previously head of a national solicitors network, he is now concentrating on risk management. Damon is also a Law Society approved Adviser for the Lexcel Standard.

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Manchester London	18 May 8 Jun
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£210 + VAT CLT Members/£420 + VAT Non-members

## Management Course Stage 2 - Developing the Manager

Advanced | 6 hours CPD

The need for effective management in law firms has never been more crucial than in today's rapidly changing environment. As your career as a solicitor develops your ability to manage becomes more and more crucial.

If you have or are hoping to have additional management responsibilities as a senior solicitor or new partner in private practice this is the course for you.

This course covers strategic practice disciplines and the skills and personal qualities useful in a successful manager and partner.

- Business planning
- Drivers of profitability
- Marketing
- Role and responsibilities of a manager
- Developing leadership skills

The Solicitors' Code of Conduct Practice Rule 13 makes the effective running of the firm a matter of professional conduct, requiring partners 'to be able to produce evidence of a systematic and effective approach to management'. This course will help you meet this requirement.

Speaker: **Peter Scott** is a solicitor and former Managing Partner of Eversheds London and European offices. He acts as an adviser and coach to many law firms in the UK and abroad in relation to their financial, strategic, performance, compliance and business development issues.

London 14 May

£210+ VAT CLT Members/£435 + VAT Non-members

## Management Skills for Leaders of In-house Legal Teams (Management Course Stage 2)

Advanced | 6 hours CPD

This course meets the needs of those who are managing an in-house team or have aspirations to do so.

It complements Management Course Stage 1 for In-house Lawyers which provides an orientation for in-house lawyers in the early stages of their career (and was previously called Management Course Stage 2).

If you are new to a management role, this course will provide you with the training you need. If you are an experienced manager, it will provide calibration that you are on the right track or a stimulus to adapt your approach.

Topics covered include:

- Business strategy for the legal department
- Client relationship management
- Managing and developing the in-house legal team

Speakers: **Mark Prebble** worked for 20 years as an in-house lawyer for companies in the UK and Europe. In 1998 he left The BOC Group plc where he was Group Legal Adviser, to set up Lawyers in Business, an organisation dedicated to support and develop in-house lawyers and **Anthony Inglese** was the top lawyer at five government departments before his retirement. His last legal department won two awards in 2013 for Best In-House Public Sector legal team of the year.



*This was an excellent course, very useful*



London 12 May

£210 + VAT CLT Members/£420 + VAT Non-members

# Understanding and Interpreting Company Accounts

Best Seller

Foundation | 6 hours CPD

Introduction to accounting concepts, including:

- Small and medium company thresholds, audit exemptions, where non-corporate entities fit
- UK GAAP: the framework
- IFRS: who it applies to and the framework
- Examples of differences between UK GAAP and IFRS
- The future of UK Financial Reporting: FRS 100,101 and 102 and the potential impacts.
- Contents of financial statements - Profit and loss account - Balance sheet
  - Cash flow statements - Discussion of why profit does not always mean cash
  - Overview of other statements, notes etc.
- Group accounts - Introduction to basic group accounting principles - Consolidation of overseas subsidiaries - How to account for an acquisition What is goodwill and what do we do with it? - Associates and joint ventures - Merger accounting.
- Tricky and judgemental areas - Fixed assets - depreciation and revaluation - Stock - costing and provisions - Bad debt provisions - Provisions and contingent liabilities - Leasing - Revenue recognition - Defined benefit schemes - Share based payment.
- Valuation and deal issues - Common methods of valuing companies - Focus on EBITDA - what does it mean? - Enterprise value and cash-free/debt-free.
- Dividends and distributions - Interaction of accounting and law - What are realised profits and losses? - Practical issues when declaring dividends.

Speaker: **Martin Howard** is Hazlewoods' Technical Partner and has spent much of his career working with corporate clients, providing advice in the areas of audit, corporate tax, management accounting and general business. He has worked on a wide variety of clients in many different industries including manufacturing, tourism, construction, distribution and the charity and not-for-profit sector.

London 3 Feb, 2 Jun

£210 + VAT CLT Members/£420 + VAT Non-members

# Increasing Privately Funded Criminal Work

Intermediate | 6 hours CPD

The changes to legal aid and the swinging reductions in fees are putting criminal practitioners under huge financial pressure. Practitioners will be keen to increase the amount of privately funded criminal work they receive, not only to bridge the gap but also as it is more profitable. This course, led by a solicitor advocate whose practice is now 50% privately funded work, will explain how to increase that work and manage it efficiently and profitably.

## Planning

- Where are you now? • What do you want to achieve? Who is in your client base?
- Changing legal market: how do you get private work?

## People, pricing and products

- Skills and service audit what sets you apart? Motivating the team to change and to develop business.

## Branding and repositioning

- Generating awareness and leads • The web and social media • Winning new business.

## Managing and converting enquiries

- Enhancing the client experience and existing client management • Nurturing referrals and intermediaries.

## Developing your plan

- Measuring performance • Partner/lawyer personal marketing plans.

## Costs implications

Speaker: **Kenneth Carr** is a solicitor advocate and recorder and a founding member of Perren Buildings Chambers and a consultant with Sternberg Reed, Solicitors. Ken is a member of both the VHCC and Serious Fraud Panels.

London 14 May  
Leeds 20 May

£150 + VAT CLT Members/£420 + VAT Non-members



## Business Development for Lawyers

Foundation | 6 hours CPD

This course will equip lawyers with a range of strategic marketing, tactical business development and selling skills and activities which they should undertake whether working with commercial or private clients.

The course starts by considering the context of changes in the market and strategic firm-wide issues, considers the various traditional and online promotional marketing tools available and progresses onto selling to new clients and developing more business from existing clients and referrers.

### Get ready

• Set goals • Consider your firm and departmental context • Analyse your referrers, clients and work • Discover new client needs and develop new services • Select the right strategy • Develop a niche practice.

### Take action

• Identify targets using research • Raise your profile • Use social media to listen to the market and make connections • Generate enquiries and leads.

### Produce results

• Learn selling skills • Manage client and contact information • Pitch effectively for new clients and work • Convert enquiries into clients • Develop action plans • Monitor progress and results.

Speaker: **Kim Tasso**, BA, DipM, MBA, is an independent strategic marketing consultant, specialising in the professional services sector, with over 30 years' experience including a senior business development role at Nabarro Solicitors.

London 24 Jun

£210 + VAT CLT Members/£420 + VAT Non-members

## Wills Quality Schemes: WIQS and STEP

**Hot Topic**

Update | 6 hours CPD

Should your firm join? Can you meet the standard? Will joining help you win clients?

The Lord Chancellor's decision to reject the LSB's proposal for the regulation of will writing means that it is more important than ever for firms with real expertise to find a way of demonstrating their specialist knowledge.

The Wills Quality Scheme (WQS) has now come into effect and offers exactly that.

It is intended to differentiate the dedicated specialists from those who mix this work with other areas of practice. Based on the successful Conveyancing Quality Scheme, it covers will writing and estate administration with scope to extend it to powers of attorney and elderly client matters.

This course will take you through the various elements of the protocol, explaining what must be achieved, what safeguards must be in place and the matters to be considered when formulating a practice policy. It will also explain the process for becoming a member of the WQS.

Speaker: **John Bunker** is Head of Private Client Knowledge Management for Thomas Eggar LLP, a role developed after 26 years with the firm specialising in wills, trusts, estate and tax planning. In more recent years he has developed regular training in these areas. He has worked extensively with financial planners and investment managers for mutual clients and has played a leading role in developing relationships with financial planners for the firm.

Leeds 12 Jun  
London 25 Jun  
Birmingham 26 Jun

£210 + VAT CLT Members/£420 + VAT Non-members

# HR Skills and Policies for Legal Practitioners

Intermediate | 6 hours CPD

This course provides the managing partner, in house practitioner or employment solicitor in private practice with an important toolkit as to how to implement employment law advice and workplace policies. So often clients are given advice or directed to take a course of action, but they have little means or knowledge as to how to deal with their employees for the advice to take effect. The course focuses on providing you with the skills and confidence to successfully advise upon the practical implementation of HR advice and provides a comprehensive guide to drafting and implementing HR policies.

Part One: Implementing HR policies:

- Recruitment and selection
- Induction
- Policies and procedures
- Performance management and appraisal
- Tackling difficult people issues
- Best practice HR
- How to make policies work to maximise your firm's performance
- The key HR elements

Part Two: Case studies on implementation of legal advice

- Discipline/dismissal for conduct
- Implementing redundancy selection
- Dealing with discrimination, stress and harassment

Speaker: **Sue Hatton** is a human resources consultant and a chartered fellow of the CIPD. Sue has acted as HR consultant to Pickerings Solicitors LLP and their clients since 2002.

London 10 Feb

£210 + VAT CLT Members/£420 + VAT Non-members

# Supervision: Essential Skills for Lawyers

Intermediate | 6 hours CPD

Supervision is an essential part of law practice governance and compliance. The penalties for failure can be onerous.

However, the lawyer or team leader's supervisory duties often grow gradually and without any thought about what skills are required by the supervisor to enable her or him to meet those responsibilities effectively.

This course has been specially designed for lawyers who find themselves with new or increasing supervision responsibilities.

The following topics will be covered:

- The statutory framework for supervision
- The supervisory relationship
- Methods, styles and systems of supervision in the modern law practice
- How to deliver feedback constructively and in ways that produce results
- Working with different personality types and motivations
- Designing supervisory system for your practice

Speaker: **Neil Denny** is a family lawyer and mediator with Family Law in Partnership as well as being an author and regular international speaker on collaboration and dispute resolution skills.

**“ The Speaker was very clear and the animated delivery ensured good levels of concentration and participation. ”**

London 19 May

£210 + VAT CLT Members/£420 + VAT Non-members

## Legal Aid Supervision: An Introduction

**Hot  
Topic**

Foundation | 7 hours CPD

This course has specifically been designed for those who are stepping into the role of legal aid supervisor or deputy for the first time. The course has been written with the demands upon supervisors under the SQM and legal aid contracts in mind, and explains the role of the legal aid supervisor and the management skills needed to be effective.

Course content:

- It meets the generic requirements for supervisor status on page 1 of the LAA Supervisor Form
- Meets the requirements of the 2015 own and duty crime contracts
- Covers supervision requirements in the 2013 legal aid contract
- Covers SQM 2013 and Lexcel 6 requirements for supervision and file review
- Practical supervision - day to day techniques for better file compliance
- Hints and tips for dealing with legal aid audits
- Building relationships and credibility
- Time management.

Outcomes focused regulation makes the effective running of the firm a matter of professional conduct. It requires effective systems for supervision, risk management and delegation, and expects training to ensure the competence of all personnel in performing their duties. This course will help you meet this requirement.

Speakers: **Vicky Ling**, BSc MPhil, is a specialist legal aid consultant, member of the Low Commission and formerly managed a CAB, a law centre and a housing advice centre, as well as implementing the then Legal Aid Board's quality assurance standard and **Matthew Moore** is the Director of Consultancy Services with Infolegal Ltd – specialist compliance and practice management advisers to the legal profession – and is also a consultant solicitor with the regulatory specialists Jayne Willetts & Co.

Bristol	4 Feb
Manchester	11 Feb
London	18 Feb
Leeds	25 Feb

£210 + VAT CLT Members/£420 + VAT Non-members

## Managing and Motivating People

Intermediate | 6 hours CPD

Designed for staff with responsibilities within a legal environment (or for those about to undertake them), this course provides an overview of the key issues to be understood to manage people well in a rapidly changing environment.

For law firms, people are the most important and most costly investment made. It is therefore vitally important that all 'people managers' understand a range of tactics and methods to ensure that the firm not only maximises its return on the investment but also creates a culture within which staff are happy and want to play their part in achieving the firm's goals.

This practical and interactive course takes the fear out of managing people and explores the following key areas:

- What is different about law firms?
- Common goals, values and standards
- Motivating people
- Leadership and teams effective delegation coaching and development
- Performance management and 'difficult' people
- Managing change

Speaker: **Keith Harper** is Managing Director of Harper Professional, and is a management consultant and trainer who works solely with law firms. He has 15 years' experience of successfully advising and training a wide range of clients from global businesses to small partnerships. From previous senior roles in industry, and the professional services sector, Keith has gained a wealth of experience of management issues, and specifically of the role of management within the legal environment.

London	19 May
Manchester	21 May

£210 + VAT CLT Members/£420 + VAT Non-members

## Performance Management in Legal Practice

Intermediate | 6 hours CPD

If you are responsible for managing the performance of people in a legal practice environment, then this one day workshop is for you. Specifically designed to help you achieve maximum effectiveness quickly, it will equip you with the tools, knowledge and attitudes you will need to help others give their best in their roles.

The course is ideal for lawyers who also need to manage, whether that managing individuals, teams or departments, including both legal and support staff.

Practical, pacy and relevant, this course will enable you to handle management of people to help you achieve successful performance for your firm or organisation.

You will learn how to:

- Get to grips with your role as a manager and leader
- Understand the main factors which affect job performance
- Define and communicate performance standards
- Delegate effectively
- Give feedback that people can actually use!
- Manage poor performance
- Inspire people to perform at their best
- Use coaching as a development tool
- Build a culture of excellence

Speaker: **Elizabeth McManus**, MA, Grad IPD, is a founding partner of Development Alternatives – a professional training and management consultancy – and a former personnel and training manager with Addleshaws.

London 16 Apr

£210 + VAT CLT Members/£420 + VAT Non-members

## Assertiveness Skills

Foundation | 5 hours CPD

This course enables you to improve your assertiveness skills enabling you to ask for what you want and manage expectation using constructive communication skills.

Maybe you face the challenge of having to speak up for your views more in tough situations or with challenging people. Maybe you know that you can become aggressive under pressure. In either case, you know you want to have the power to communicate more effectively and achieve better outcomes. This is the course for you. Practical and pacy, it will enable you to work out new strategies and improve your impact on people and on situations.

Topics covered include:

- Shaping events - asking for what you want
- How to say what you mean
- Managing expectations
- Constructive communication principles
- Becoming more assertive - confidence building
- Defusing aggression in self and others
- Building personal credibility
- Assertiveness, power and influence
- Managing conflict assertively
- Use of challenging and probing

Speaker: **Elizabeth McManus**, MA, Grad IPD, is a founding partner of Development Alternatives – a professional training and management consultancy – and a former personnel and training manager with Addleshaws.

London 23 Apr

£210 + VAT CLT Members/£420 + VAT Non-members

## Essential Legal Skills Certificate for Support Staff

Foundation | 5 hours CPD

Working in a legal office involves much more than being an effective typist. Many members of support staff have contact with clients, work on their own as well as handling telephone calls and supporting fee earners in their team.

This practical course will provide an introduction to many aspects of working in a legal environment and is designed to give an essential grounding to legal support staff wishing to consolidate their experience or non-legal support staff wishing to pursue a career in a legal office. It will act as a foundation to build on with further training in specific areas of the law.

The course will aim to give a basic understanding of:

- An introduction to different areas of law
- Departments and personnel in law firms- Working in a legal environment - confidentiality, conflicts and undertakings
- Structure of the courts; case law; citing cases; the judiciary
- Some general procedures; layout and execution of documents; instructing a counsel
- Court documents; affidavits and witness statements
- Case management

At the end of the day, you will receive a certificate to show that you have completed the course.

Speaker: **Lorraine Richardson**, MA(Cantab), Solicitor, specialising in residential conveyancing in a practice in Suffolk. Lorraine has a wealth of experience, and is also a co-editor of the popular and practical Law Society publication "Conveyancing Forms and Procedures".

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London      22 Jun

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£210 + VAT CLT Members/£420 + VAT Non-members

## Unconscious Bias **NEW**

Intermediate | 3 hours CPD

This powerful session is aimed at all lawyers and support staff whatever their role and responsibilities within the firm.

What will be covered:

- Getting an understanding of exactly what bias is
- Acknowledging the part played by power, our likes, dislikes, prejudice, stereotypes and experiences and how we filter the messages we receive in every day-to-day contact with others
- Recognising the 7 bias effects that are most common and finding practical ways to manage them
- How bias can affect decision-making and judgement in everyday legal practical ways to manage them
- How bias can affect decision-making and judgment in everyday legal practice with special focus on: who and how the firm selects new staff; witness interviewing and the firms culture
- Unconscious bias and how it contributes to 'wilful blindness' and what this can mean for your individual practice and behaviour AND your firm's profitability
- Sharing practical tips and strategies for keeping personal bias in check and managing it effectively

Speaker: **Geoff Coughlin**, FITOL, CMCIPD, has had wide experience of managing and training solicitors, managers, police officers and trainers in the private and public sectors.

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London      5 May pm

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£140 + VAT CLT Members/£280 + VAT Non-members

## Presentation Skills for Lawyers

Foundation | 6 hours CPD

Presentation skills need to be a fundamental part of every lawyer's skills repertoire.

This course has been designed for lawyers and other law firm professionals with no or very little experience of delivering presentations. It will be ideal for individuals who want to bolster their confidence and professional profile and standing. It will also be ideal for delegates identified by their employers as being ones they want to give a higher profile to, whether within the law firm or externally to their market and potential new market sectors.

This course will cover the following key presentation skills:

- Understanding what makes a presentation work well - and what to avoid
- Content creation - writing a great presentation • What does this audience really need? • What do I need to get across? • What do I need to leave out? • Designing visuals to help you to communicate - how to speak in public using: voice; stance; humour; gestures • The use of notes • Managing nerves • Learning to love questions from the audience • Being able to write brilliant content tailored to meet the needs of any specific audience and then deliver it in ways that are engaging, memorable and compelling.

Speaker: **Neil Denny** is a family lawyer and mediator with Family Law in Partnership as well as being an author and regular international speaker on collaboration and dispute resolution skills.

“ Overall course was excellent and Neil was engaging ”

London 9 Jun

£210 + VAT CLT Members/£420 + VAT Non-members

## Getting the Very Most Out of Your Day

Intermediate | 5 hours CPD

The key to making the most of your time is planning and then protecting your plan. People who say that they have no time do neither plan nor protect.

If you plan what to do and when, and then stick to it, then you will have time. For people who have demands placed on them by others, particularly other departments, managers, and clients, you are obliged to diplomatically manage the expectations of others.

Getting the most from your day is chiefly about conditioning your environment, rather than allowing your environment to condition you. If you tolerate, and accept without question, the interruptions and demands of others then you create your own time management problems.

Objectives:

- To understand a seven stage process for managing your time • To become aware of where your time is being spent • To be aware of where your time should be spent • To take away some key hints and tips for immediate application • Current use of time • Time comparisons • Time wreckers • Prioritising tasks • Improving your efficiency • Delegation • Assertiveness • Review.

Speaker: **John Ranson** has a vast range of experience in management training from many sectors and delivers enjoyable, practical training focused on providing solutions for day to day business issues.

“ Title of the course says it all - well presented and very helpful ”

London 16 Jun

£210 + VAT CLT Members/£420 + VAT Non-members

## Negotiation Skills Improvement Workshop

Intermediate | 6 hours CPD

Everyone negotiates; not everyone negotiates well. Improve your own skills through this interactive workshop which develops the practical skill of the delegate through a series of case studies. As a result of participation throughout the sessions you will gain an improved negotiation technique.

The course is suitable for lawyers, business managers and other professionals.

Topics covered include:

- Preparing effectively for face to face negotiation and meetings and understanding how the theory can change your practice
- Implementing and identifying different negotiation strategies
- Dealing with tactics from the other side
- How to avoid deadlock
- Controlling the agenda
- Spotting professional conduct problems
- Putting forward an effective argument
- How to be persuasive
- How to make rational and measured concessions
- Managing a client's expectations and benchmarking and dealing with 'terrorists'

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at St Ives Chambers, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

London 29 May

£210 + VAT CLT Members/£420 + VAT Non-members

## Project Management for Transactional Lawyers

Intermediate | 6 hours CPD

Running a transaction requires operational efficiency based on first class organisational skills. Clients appreciate a lawyer who runs their matter smoothly and effectively. Quality project management ensures that you achieve the right outcome for your client with maximum efficacy.

This course will demonstrate the benefits of running a project successfully. It will enable delegates to acquire tips, techniques and tools for use in seeing a matter through with procedural smoothness from instructions to final bill.

Participants will use a current matter of their own (no files needed) as an action learning case study throughout the course.

Course content:

- The nature of a project • Benefits of project management • The stages and phases of a project • Client instructions and scoping • Setting parameters • Planning the project • Work breakdown and task analysis • Resource allocation • Setting timelines • Using GANTT charts to control task activity and work flow • Monitoring the process • Stakeholder management • Risk assessment and safety nets • Final review and signing off • Feedback session.

Speaker: **Martin Richardson** is a lawyer who began his career as a legal academic before moving to the City and the former Berwin Leighton to set up and run the firm's first professional development programme.

London 17 Mar

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## Dealing with the Legal Ombudsman

This webinar will be of interest to all practitioners who encounter The Legal Ombudsman either because their firm has been complained about, or through assisting clients in referring a matter to the Ombudsman.

The webinar is presented by Catherine Burtinshaw, a solicitor with 16 years of post qualification experience in handling professional negligence claims and will include tips on good complaint handling as well as an explanation of how the Ombudsman resolves disputes, the Complaints Portal, costs and data publication.

Speaker: **Catherine Burtinshaw** is a solicitor with 16 years of post qualification experience in the field of Professional Negligence from the Defendants' perspective. Catherine has worked at Addleshaw Goddard, Weightmans and Kennedys handling claims against a broad range of professionals including solicitors and barristers. She has also advised upon policy coverage issues and wording disputes.

3 Feb | 1.00pm - 2.30pm

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Speaker: Tracey Calvert

### Know Your Client: Due Diligence

Speaker: Lorraine Richardson

### LinkedIn for Lawyers: An Introduction

Speaker: Kirsty Ames

### LinkedIn for Lawyers: Tapping in to the Full Potential

Speaker: Kirsty Ames

### Making Pressure Positive

Speaker: Charlotte Points

### Managing Difficult People

Speaker: John Ranson

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Speaker: John Trimbos

### Regulatory Compliance for In-House Lawyers

Speaker: Tracey Calvert

### Risk Management

Speaker: Matthew Moore

### SRA Code of Conduct Update:

Speaker: Damon Swindell

### Taking Instructions Effectively

Speaker: Lorraine Richardson

### Time Management for Lawyers

Speaker: Charlotte Points

### Writing in Plain English

Speaker: Martin Richardson

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# DID YOU KNOW WE OFFER IN-HOUSE TRAINING?

Every so often when searching for training you're looking to address specific challenges or opportunities within your team. And that's where our bespoke in-house training comes to the fore.

If you're training multiple employees we can devise the perfect programme for your firm, and your team. Our training is highly relevant, devised by your personal training advisor and the format is entirely up to you (full day course, evening or lunch time sessions and even online provision). In-house training offers your firm fantastic value for money.

Some recent bespoke courses we have developed for our clients are as follows:

**Negotiating skills for Litigators | Project Management for Litigators | Scarring Injuries | Tips & Guidance in an ever-changing world | Product Liability Claims | Court room advocacy | Low Velocity Claims, Fraud & Jackson Implications**

PS, you can also run any of the "off-the-shelf" events in this brochure at your premises with multiple employees – no need to customise at all!

**Contact our In-house Team on 0121 362 7707 | [cltin-house@clt.co.uk](mailto:cltin-house@clt.co.uk) | [www.clt.co.uk/in-house](http://www.clt.co.uk/in-house)**

### CPR, Civil Litigation and Jackson Update 2015

Update | 6 hours CPD

This course will provide you with a comprehensive, detailed and up to the minute review of the CPR and Jackson reforms.

Just some of the topics to be covered throughout the day include:

- Reforms and updates
- Relief from sanctions
- CFAs and funding
- Pre-action protocols and ADR
- Service of proceedings in and out of the jurisdiction
- Case management
- Interim remedies
- Part 36 and settlement
- Costs
- Enforcement
- Appeals

Speaker: **Ian Gascoigne** is a solicitor and a partner of Eversheds LLP in its commercial dispute resolution group. He handles most forms of commercial litigation and has considerable experience of international arbitration. He trains lawyers on a variety of litigation subjects.

Or **Andrew McLoughlin**, Solicitor, has been granted Higher Rights of Audience for civil and criminal proceedings and sits as a recorder in the Crown and County Courts. Andrew has been described by a previous delegate as 'an extremely erudite and knowledgeable gentleman with a sharp sense of humour. An absolute joy to learn from. Truly outstanding'.

Leeds	24 Feb	Manchester	24 Mar
Newcastle	25 Feb	Birmingham	25 Mar
London	13 Mar		
Bristol	20 Mar		

£210 + VAT CLT Members/£450 + VAT Non-members

### Best Seller Hot Topic

### Conducting a Civil Claim from Start to Finish in the Post-Jackson Era

Foundation | 6 hours

This is a comprehensive and common sense course, concentrating on the practical aspects of conducting a civil claim. It is designed to give you a full understanding of how to conduct civil proceedings from start to finish and has been fully revised and updated to take account of the Jackson reforms. It will be particularly of interest to those who are new to litigation, in-house counsel and those returning from a career break.

The course includes:

- Initial instructions and steps
- What to do next in protocol and non-protocol cases
- Obtaining and preparing the evidence
- A brief outline of costs issues
- Negotiations and offers – the different options and tactics
- Part 36 offers and payments – tactics and pitfalls
- Statements of case and starting proceedings
- The tracks and case management
- Interim applications
- Preparing for trial and trial procedure
- Judgment and enforcement.

Speaker: **Andrew McLoughlin**, solicitor, has been granted Higher Rights of Audience for Civil and Criminal proceedings and sits as a recorder in the Crown and County Courts. Andrew has been described by a previous delegate as 'an extremely erudite and knowledgeable gentleman with a sharp sense of humour. An absolute joy to learn from. Truly outstanding'.

London	11 Feb, 3 Jun
Manchester	12 Feb
Bristol	4 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## Certificate in Civil Litigation Procedure

Foundation | 12 hours CPD

This 2 day course is designed for practitioners wishing to gain a good practical grounding in this field. It is suitable for trainees, newly qualified solicitors and paralegals as well as for those returning after a career break or wishing to change disciplines. It is designed to provide an A to Z of litigation.

Topics covered include:

- Preliminary matters
  - Information required from and to be given to the client
  - Costs considerations
  - Is the claim/defence worth pursuing?
  - Limitation
  - Can it be settled?
  - Pre-action protocols
  - Negotiations and tactics
  - WP and open communications
  - Part 36
- Preparing for litigation
  - Pre-action disclosure
  - Obtaining information from third parties
  - Preserving evidence
  - Pre-action interim remedies
- Starting proceedings
  - Drafting statements of case
  - RFIs
  - Issuing and serving the claim
- Case management
  - Allocation and directions
  - Strike out/court sanctions
  - Vexatious applications
  - Early judgment
  - Summary judgment/strike out
  - Default judgment

- Witness statements
  - Preparing statements for interim applications and trial
  - The use of witness summaries
  - Hearsay evidence
- Experts
  - Single joint and separately instructed experts - the practical implications
  - Instructing the expert
  - Without prejudice meetings
  - What can the other side see?
- Disclosure
  - What needs to be disclosed?
  - Available objections
  - Privilege claims
- Preparing for trial

Speaker: **Francis Treasure** is a member of Chambers at 42 Bedford Row, London, where he practises in common law, specialising in professional negligence and personal injury.

**Andrew McLoughlin**, Solicitor, has been granted Higher Rights of Audience for civil and criminal proceedings and sits as a recorder in the Crown and County Courts. Andrew has been described by a previous delegate as 'an extremely erudite and knowledgeable gentleman with a sharp sense of humour. An absolute joy to learn from. Truly outstanding'.

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<b>London</b>	<b>9 - 10 Feb, 1 - 2 Jun</b>
<b>Manchester</b>	<b>16 - 17 Mar</b>

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£495 + VAT CLT Members/£795 + VAT Non-members

# Part 36 - The Ultimate Guide

Update | 3 hours CPD

Part 36 is, arguably, the most important of the Civil Procedure Rules. Used effectively, it is an invaluable tool for the litigator. It can make the difference between a 'pyrrhic' victory and a real recovery for the client. It enables positional bargaining and effective negotiations.

This course provides an in-depth guide to the rule and updates practitioners on the very latest case law.

- The requirements of the Part 36 offer
- Costs consequences for the claimant
- Tactics for the Defendant
- Rejecting and Withdrawing offers - the position after *Gibbon v Manchester City Council* (2010)
- Reference to 'time limited offers' after *C v D* (2011)
- *French v Groupama Insurance Company Limited* (2011)
- *Thewlis v Groupama Insurance Company Limited* (2012)
- *Joyce v West Bus Coach Services Limited* (2012)
- Pre-action Part 36 offers - how it works
- Tactics considerations and tips
- Enforcement of Part 36 offers pre and post issue
- "Beating the offer" redefined after the Carver and Multiplex cases
- The relationship with CPR Part 44 (costs)
- The Jackson reforms to Part 36
- PGF II and the costs implications
- Impact of near miss part 36 offers
- *Coward v Phaeston Ltd* (2014) EWCA-its implications.

Speaker: **Andrew McLoughlin**, Solicitor, has been granted Higher Rights of Audience for Civil and Criminal proceedings and sits as a recorder in the Crown and County Courts. Andrew has been described by a previous delegate as 'an extremely erudite and knowledgeable gentleman with a sharp sense of humour. An absolute joy to learn from. Truly outstanding'.

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Leeds	14 Apr pm
London	15 Apr pm

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£140 + VAT CLT Members/£300 + VAT Non-members

# e-Disclosure: Your Essential Guide **NEW**

Intermediate | 3 hours CPD

As volumes of data continue to rise and parties grapple with 'big data', cloud storage and a new stream of data from mobile devices, managing electronic disclosure is becoming increasingly challenging. At the same time, the demands of litigation are becoming more stringent; costs budgeting requires parties to scope disclosure as early as possible and it is already clear that relief from sanctions will not be readily granted. This invaluable course provides a comprehensive, practical and accessible guide to managing e-disclosure.

- History and background to Part 31, the EDQ and Jackson
- Duty to preserve data for litigation
- The imperative of working with technology partners and how to choose yours
- Data collection – where it goes wrong
- Planning and preparation
- Computer forensics and the ACPO guidelines – the meaning of "document"
- Proprietary vs. non-proprietary technology
- The predictive coding revolution
- Unusual data: Instant messaging, unstructured data, chat, voice recordings
- E-disclosure and disclosure: what is the difference?
- Electronic data and search orders
- Co-operation over disclosure
- Planning and executing a reasonable search
- What is a 'defensible' process?

Speaker: **Mark Surguy** is a partner at Eversheds and chairs its ESI Taskforce. He is listed in the *Legal 500* as an "exceptional" fraud lawyer. Mark writes the E-disclosure practice notes for Lexis PSL.

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London	23 Jun pm
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£140 + VAT CLT Members/£300 + VAT Non-members

## Costs and Funding Arrangements - The Tricks, Traps and Outcomes of the Jackson Reforms

Intermediate | 6 hours CPD

To say that the last year has seen change in the civil litigation arena is something of an understatement! The decisions in *Mitchell* and subsequent cases have significantly impacted on all aspects of litigation and practitioners are seeking judicial guidance and clarification on a number of costs issues. The funding of litigation raises yet more queries and pitfalls - what's happening with DBAs, are CFAs still a viable product and what about ATE and who should pay for it?

This course has been specifically designed to examine the world pre and post-Jackson and provides a comprehensive costs and funding update including:

- Proportionality pre and post Jackson
- Relief from sanctions – notice of funding, s.32 information
- Funding a case – what arrangements can we now use? And what about our old cases?
- Costs recovery– summary, provisional and detailed assessment
- Costs Management – the developing case law
- The Court's new approach to litigation
- Success Fees and ATE Premiums – what can I recover and when?
- Fixed costs – MOJ Portal, predictive costs and cases that 'drop out'
- Costs offers – Part 47 or Part 36? What offers to make and when?

Speaker: **Dominic Swallow** is a costs lawyer and principal at Century Consultants Limited. He has previously worked for the largest defendant costs negotiating firm in the country and has also headed up the costs unit for a top-25 national commercial law firm.

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Manchester	10 Mar
Leeds	11 Mar
Birmingham	17 Mar
London	18 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

## How to Settle a Case: A Guide for Litigators

Intermediate | 3 hours CPD

This course follows the thinking of the recent Jackson Reforms and provides a practical guide to negotiating, corresponding and drafting on behalf of your party to an advantageous compromise.

With new ideas and tips for litigators who have heard it all before, this course provides precedents and new strategies to make the most of the new approach to litigation tactics after 1st April 2013.

• Pre-action - how to correspond to engage the other side in ADR • The power of the without prejudice meeting • Working part 36 and Calderbank offers to their maximum effect • The issue checklist: have you done enough to protect your party as to costs? • Unreasonableness audit: have you sufficient evidence of their unreasonable behaviour • How to approach negotiation and the without prejudice meeting: challenging blanket refusals • BATNAs and ZOPAs • Undoing their negotiation style • Tips for deadlock and terrorists • Using recent costs slicing cases to force them to settle • Drafting a 'bomb proof' settlement agreement before issue • Undertakings and Orders • Tomlins and enforcement.

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at St Ives Chambers, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

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London	19 Jun am
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£140 + VAT CLT Members/£300 + VAT Non-members

## Enforcement of a Judgment: The New Law and Practice



Masterclass | 6 hours CPD

Last spring saw the biggest shake up in debt enforcement for many years. Provisions of the Tribunals, Courts and Enforcement Act 2007, for which we waited six years, were finally enacted.

All practitioners working in the area of commercial litigation and debt recovery need to understand how these developments impact on their practice. This Masterclass will explain the changes and update you on other recent developments in the world of enforcement.

Presented by Stephen Allinson, a very experienced solicitor in this area and Alan Smith, a high court enforcement officer, the masterclass will be practical and work through case studies. It will provide tips and tactics to ensure you are not caught out by these changes and that you are able to advise your clients swiftly and effectively on recovery options.

The masterclass will cover:

- Tribunals Courts and Enforcement Act 2007 - goodbye to writs of Fi fa and hello to Taking Control of Goods
- The review of Enforcement Regulation generally
- Crime and Courts Act 2013 - what does this say about enforcement?
- Charging Orders and Orders for Sale - should we be using them more?
- Protecting the assets in debt recovery: injunctions and insolvency proceedings
- Landlord and Tenant Debt Recovery - welcome to the world of CRAR

Speakers: **Stephen Allinson** is Chairman of the Joint Insolvency Examination Board. He is a Consultant with Lester Aldridge Solicitors as well as lecturing and presenting. He has for many years been recognised as a 'leader in his field' by legal directories. He regularly contributes to professional publications and has written a leading text on Debt Recovery.

**Alan Smith** is Director of Corporate Governance at HCE Group. He is an authorised high court enforcement officer. Alan sits as a director and treasurer of the High Court Enforcement Officers' Association. He has worked on the expert working group with the Security Industry Authority on a future licensing of enforcement agents and also worked closely with the High Court Enforcement fees. He sits on the Association's educational board and is an ICM examiner for the Association's newly established qualification.

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London	11 Mar
Manchester	25 Mar

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£310 + VAT CLT Members/£495 + VAT Non-members

## Contractual Disputes: The Complete Picture

Intermediate | 6 hours CPD

This is a highly practical course which focuses on the opportunities and risks occurring in every day commercial contracts which underpin most civil disputes, making it a must for private practitioners and In-house lawyers whether negotiating, drafting or litigating on contract and commercial matters.

Topics covered include:

- The legal risks audit • Avoid litigation - essential protective terms • Incorporation of terms and life after the "battle of the forms" • Avoiding challenges to the enforceability of settlements • Entire agreement clauses, pushing them to the limit • Compromise agreements: 3 simple rules • Damages update, recent developments and calculation issues • Liquidated damages and penalty clauses revisited, the use of a condition precedent • Making time of the essence, the danger of the Union Eagle case • Post termination restrictive covenants • Language and punctuation • Exclusions and limitations • Contractual intent and enforceability including the danger of commencing work prior to "signing off" • Discharge and terminating the contract and the exposure of wrongful termination • Dispute resolution provisions and ADR clauses • Traps for the unwary • The solicitors' "must know" list of contract and commercial law principles.

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at St Ives Chambers, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

London	27 Feb, 5 Jun
Manchester	13 Mar
Birmingham	12 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## Limiting Liability - Indemnities, Warranties and Guarantees that Work **NEW**

Advanced | 6 hours CPD

This brand new course is aimed at experienced practitioners who negotiate and draft commercial contracts in private practice and in-house and may also be of interest to litigators. It undertakes an in-depth review of the problem areas around the limitation of liability in commercial contracts. It will also identify common obstacles in negotiations and suggest ways in which these can be navigated:

- Limitation of liability: caps, what is reasonable? Deliberate breach scenarios; relationship with entire agreement, warranties and indemnities.
- Indemnities: providing and resisting, scope and 'trigger' mechanisms, support or replace the obligation, enforcement
- Warranties: what can be covered? How to tailor to specific use; services warranties, title, IPR and quality, flow-down and chain issues
- Financial and performance guarantees: form and structure, primary and secondary issues, using bonds and escrow, the impact of change control, e-signatures and pre-emptive defences and enforcement

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at St Ives Chambers, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

**“Helen was as informative, engaging and entertaining as ever. Clear and helpful seminar”**

London	20 Mar
Leeds	27 Mar

£210+ VAT CLT Members/£450 + VAT Non-members

12  
**4** February 2015  
Central London

**Fees: £415 + VAT CLT Members/£525 + VAT Non-Members**

These remain challenging times in regulatory law.

The tensions between the declared intention of Government to take a balanced approach to regulatory action and the enthusiasm of some regulators are substantial. Critics say enforcement decisions sometimes seem to be driven by public perception and the opportunity to seek Proceeds of Crime Applications. Businesses, and others who are regulated, face increasing reputational risk and, if convicted, fines which are growing larger by the month.

This conference, aimed at regulatory lawyers, will help you meet the needs of the client with a selection of speakers all of whom are undoubtedly leaders in their fields of practice.

## *Chair*

David Travers QC practices regulatory law from 6 Pump Court which was 'Health and Safety Chambers of the Year 2013'. He is unique at the Bar in being recommended in both independent guides to the legal profession as a leading barrister in the three fields of consumer law, health and safety and environmental law. The 'Guide to the UK Legal Profession' says he has an "extremely charming court manner, but can be ruthless when he needs to be. An intelligent yet highly commercial advocate," "Outstanding in conferences and in court." and says he is "very good at dealing with large, complex cases" the Legal 500 praises his 'charming and disarming style of advocacy'. David is also a published academic and Visiting Professor in Business Accountability at The University of South Wales.

## *Speakers*

Guy Bastable specialises in crisis management and dispute resolution in relation to business crime and regulatory enforcement. He is a leading lawyer in the UK for corporate manslaughter, health and safety, criminal fraud, insider dealing, and money laundering. Guy has particular expertise in fatal accidents and has successfully defended both organisations and individuals.

Lee Bennett is ranked as a 'leading junior' in Chambers and Partners (health and safety) and the Legal 500 (consumer and health and safety). He is a specialist regulatory barrister with a practice encompassing the range of regulatory work, but with an emphasis on health and fire safety, trade and consumer, environmental, and food safety law.

Sarah Clarke has worked at West Berkshire Council for over 10 years, practising predominantly in the field of regulatory enforcement. Sarah's practical experience covers the full range of local authority prosecution work, dealing with both contested and uncontested matters. This includes significant high profile cases dealt with in the Crown Court.

Jon Cooper has acted in many of the major cases in recent years including Buncefield, Corus Port Talbot and the Channel Tunnel rail link explosion. He has been recognised as a leading practitioner in health and safety for many years and Chambers 2014 says "He is generally acknowledged to be the leading health and safety solicitor in the country".

David Hercock practises from 6 Pump Court in regulatory law and has particular expertise in health and safety, fire safety, environmental, food and consumer law.

Oliver Saxby QC is a specialist criminal advocate with a particular interest in gross negligence manslaughter (successfully represented the Officer of the Watch on the P&O ferry the Pride of Bilbao charged with the manslaughter of three yachtsmen in the Solent), corporate manslaughter, regulatory crime and asset recovery.

Mark Watson is a specialist regulatory barrister shortlisted by Chambers & Partners in 2013 for the Health & Safety Junior of the Year award. Specific areas of speciality are health & safety, fire safety, maritime safety, environmental law, food safety and consumer protection.



## 9.00

### 9.30 Chair's Welcome and Introduction

David Travers QC, 6 Pump Court

### 9.45 First Contact - How to Deal with the Regulator's Knock on the Door

Criminal liability for organisations, directors and employees | Investigation risks | Investigators' powers | Preparing the client in advance | Defending the investigation.

Guy Bastable, BCL Burton Copeland

### 10.00 Enforcement and Prohibition Notices

Types of 'enforcement notice' in regulatory proceedings | Improvement notices and prohibition notices in health and safety matters | Case study: appealing an improvement or prohibition notice | Other developments - fee for intervention and deferred prosecution agreements.

Lee Bennett, 6 Pump Court

### 10.45 Refreshments

### 11.00 How to Defend Well

How to avoid prosecution | Review of the prosecution case | Conduct of the defence - practical considerations.

Sarah Clarke, West Berkshire Council

### 11.45 Food Safety Prosecutions

The scope of the responsibility | Fashions and foibles from "milk" to "organic" and "home-made" to "natural" | Understanding the relationship between risk and likelihood | Addressing failings amongst staff | The due diligence defence.

David Travers QC, 6 Pump Court

### 12.30 Questions

### 12.45 Lunch

### 1.45 Fire Safety

The fire safety duties | Risk and foreseeability | Offences and defences.

David Hercock, 6 Pump Court

### 2.30 Corporate Manslaughter - Where Are We Going?

The cases to date | What do they tell us? | Has the Corporate Homicide and Manslaughter Act 2007 delivered? If no, why not?

Jon Cooper, Bond Dickinson

### 3.00 Refreshments

## Essential for all regulatory lawyers: helping you to meet the needs of your clients

### 3.15 Sentencing in Regulatory Proceedings

The Environmental Offences Sentencing Guideline | The Draft Health & Safety Offences Sentencing Guideline | Recent sentencing cases.

Mark Watson, 6 Pump Court

### 4.00 Confiscation in Regulatory Proceedings

Basic principles | Recent case law | The future.

Oliver Saxby QC, 6 Pump Court

### 4.45 Chair's Concluding Remarks and Questions

## 5.00

# Getting to the Money - Proactive Debt Recovery in 2015

Update | 6 hours CPD

This course is aimed at civil litigators, debt recovery practitioners and paralegals who wish to enhance their understanding of the debt recovery process from taking instructions through to enforcement in the new regime.

It includes:

- Compliance and Regulatory Issues
- Pre-action considerations: profiling the debt and the debtor
- Possible defences
- Limitation
- Interest
- Default judgments
- Summary judgment/strike out
- Costs and Part 36 offers
- Enforcement: advantages and disadvantages of different remedies
- Insolvency procedures: when to use and when to avoid
- Recent reforms and case law.

Stephen Allinson has a proven track record in establishing a successful, nationally recognised debt collection practice and will provide advice on marketing, developing and building a debt recovery practice. You will have the opportunity to apply your knowledge through practical group exercises and leave confident and ready to put into practice what you have learnt.

Speaker: **Stephen Allinson** is Chairman of the Joint Insolvency Examination Board. He is a Consultant with Lester Aldridge Solicitors as well as lecturing and presenting. He has for many years been recognised as a 'leader in his field' by legal directories. He regularly contributes to professional publications and has written a leading text on Debt Recovery.

London	13 May
Leeds	27 May

£210 + VAT CLT Members/£450 + VAT Non-members

# Professional Negligence Claims - Pursuing and Defending

Foundation | 6 hours CPD

This course is aimed at litigators who are new to, or looking to expand their practice into, professional negligence and will also be a useful refresher for those returning from a career break. It examines the key issues in law and practice that will be relevant to practitioners, whether they act for claimants or defendants and delegates will be given the opportunity to apply these issues in a case study. The course will look at:

- The basis of the duty of care - when does it arise?
- Examples of the standard of care - how is it measured?
- The 'reasonably competent' test explained
- The standard of care as it applies to solicitors, surveyors, accountants etc,
- Causation and remoteness
- Measuring the loss - how the court quantifies the claim in damages
- Contributory negligence and contribution
- Limitation
- Pre-action conduct
- Working with experts
- Negotiation of a settlement including Part 36
- Mediation

Speaker: **Andrew McLoughlin**, Solicitor, has been granted Higher Rights of Audience for civil and criminal proceedings and sits as a recorder in the Crown and County Courts. Andrew has been described by a previous delegate as 'an extremely erudite and knowledgeable gentleman with a sharp sense of humour. An absolute joy to learn from. Truly outstanding'

Birmingham	18 Mar
London	19 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

## Professional Negligence Update

Update | 5 hours CPD

This course will focus on developments in professional liability, including both negligence and contractual liability, as reflected by appellate court case law over recent years.

You will gain an understanding of professional liability, the duty of care, the standard of care, causation, loss of chance, and limitation in a number of professions, with a particular emphasis on solicitors' and barristers' liability, but including some coverage of surveyors, accountants' and insurance brokers' claims. A large number of the principal cases in this complex field shall be discussed. There will also be a practical session focusing on a recent case that raises many issues covered in the course. Finally, delegates will receive an insight into the implication for professional liability practitioners of the Jackson reforms, *Mitchell vs. News Group Newspapers* [2013] EWCA Civ 1537 and subsequent cases.

Speaker: **Laurence Page** is a commercial barrister at Hardwicke with particular specialisms in professional liability, insurance coverage and construction disputes. In his professional negligence practise, Laurence has a wealth of experience bringing and defending high-value and complex actions against solicitors, financial services professionals, surveyors, accountants, actuaries, insurance brokers and architects. Laurence previously worked as an employed barrister at a leading city law firm and has been seconded to a major insurer.

London	12 May
Leeds	19 May

£210 + VAT CLT Members/£450 + VAT Non-members

## Solicitors' Professional Negligence Claims **NEW**

Intermediate | 3 hours CPD

All solicitors hope to pursue a career unblemished by claims. However, our increasing compensation culture and the sheer amount of regulation in our profession means that the threat of claims and complaints must be faced. This practical guide to both pursuing and defending negligence claims will assist.

The course will cover solicitors' professional indemnity claims from various angles. It will focus upon:-

- Areas of legal practice which tend to attract the highest volume of claims. These include conveyancing, trusts and probate and personal injury.
- Bringing claims against solicitors.
- Defending claims on behalf of solicitors and their Professional Indemnity Insurers.
- Dealing with the ever-present potential conflict of interests between the solicitor client and Insurer client faced by those acting for the Defendant.
- Tactics for all parties in running/defending a case.
- Settlement tactics for all.
- Costs and costs budgeting strategies

Speaker: **Catherine Burtinshaw** is a solicitor with 16 years of post qualification experience in the field of Professional Negligence from the Defendants' perspective. Catherine has worked at Addleshaw Goddard, Weightmans and Kennedys handling claims against a broad range of professionals including solicitors and barristers. She has also advised upon policy coverage issues and wording disputes.

Manchester	10 Jun pm
London	17 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

# Insurance Law: A Practical Introduction

Foundation | 6 hours CPD

This course, which includes a practical case study, provides a useful introduction to the key principles of insurance law including:

- Key concepts in insurance, such as good faith and indemnity
- Formation of the standard insurance contract, considering proposal forms and policies
- Formation of the insurance contract in the London insurance and reinsurance market, considering traditional documentation and documentation following market reform
- How Lloyd's work
- Construing insurance policies
- Effect of important insurance terms, such as warranties and conditions
- Insurers' entitlement to avoid insurance for material non-disclosure and misrepresentation
- Resolution of disputes through the Financial Ombudsman Service, the Courts or alternative dispute resolution, such as mediation

This course will include a practical case study which will deal with problems which frequently arise in insurance disputes.

Speaker: **Alison Green** is a barrister at 2 Temple Gardens. Alison specialises in insurance and reinsurance law. She is Vice President of the British Insurance Law Association and on the advisory panel to the Law Commission in relation to its review of insurance contract law.

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London      5 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

# 10 Tricky Points in Insurance Law

Intermediate | 6 hours CPD

This course reviews the most common difficult issues in insurance law including what entitles insurers to avoid insurance, how far the duty of good faith continues and the construction of warranties and the effect of their breach.

Topic covered include:

- When are insurers entitled to avoid insurance?
- How far is there a continuing duty of good faith?
- What if insurers are in breach of their duty of good faith?
- Construing warranties and the effect of breach
- Construing conditions precedent and the effect of non-compliance
- When can insurers be said to have waived their rights?
- When can insurers be estopped from relying on their strict rights?
- Differences between insuring on joint and composite basis
- Differences between insuring on a claims made and losses occurring basis
- Raising fraud in insurance claims

This course will include a practical case study which will involve some of the issues considered above.

Speaker: **Alison Green** is a barrister at 2 Temple Gardens. Alison specialises in insurance and reinsurance law. She is Vice President of the British Insurance Law Association and on the advisory panel to the Law Commission in relation to its review of insurance contract law.

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London      17 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

## Masterclass in UCIS Mis-Selling Claims **NEW**

**Hot Topic**



Masterclass | 6 hours CPD

Following a string of mis-selling scandals, the FCA has now turned its attention to unregulated collective investment schemes (also known as Non-Mainstream Pooled Investments), worth an estimated £2.5billion in the UK. These high risk schemes are often volatile and illiquid and can involve using derivatives to expose clients to exotic assets such as films, fine wines, traded life policies, speculative instruments and property. UCIS fall outside the Financial Services Compensation Scheme, are not authorised by the FCA and are inherently unsuitable for your average man in the street.

As a result of their concerns the FCA introduced a ban on the marketing and sales of UCIS to all but the most sophisticated investors in January 2014.

Investors' losses in schemes such as the Eclipse partnerships can run into many times the original value of the investment and look set to lead to a number of high value mis-selling claims.

This masterclass is presented by leading financial services barrister, John Virgo, who acted in key recent mis-selling case *Graiseley Properties v Barclays Bank Plc* and derivatives and investment expert Martin Berkeley.

It is aimed at litigators bringing and defending professional negligence claims for mis-selling of UCIS/NMPIs. It will examine:

- What are UCIS/NMPIs?
- The historical and current regulatory regime that applies to UCIS and NMPIs
- Formulating claims
- Avenues of redress
- Calculating loss
- Defences available

Speakers: **Martin Berkeley** is a Chartered Member of Investment and Securities Institute and an expert on investments, derivatives and private banking. Martin has advised in many mis-selling cases and has been widely quoted in the media on interest rate swap mis-selling. Martin is authorised by the FCA to advise on derivatives and regularly advises both commercial and private clients.

**John Virgo** is a barrister specialising in high-value financial product mis-selling litigation. He has appeared in all the leading mis-selling cases, including a group pension mis-selling action (*Cocking vs. Prudential*); on behalf of Equitable Life's trapped annuitants (*Abeles and Others vs. Equitable Life Assurance Society*); he acted for investors into the AIG Enhanced Variable Rate Fund who suffered substantial losses following its collapse (*Rubenstein vs. HSBC Bank*); and acted for a number of high net worth individuals and businesses in relation to the mis-selling of interest rate hedging products (*Rowley and Green vs. Royal Bank of Scotland* and *Graiseley Properties vs. Barclays Bank plc*).

London	12 Jun
Manchester	19 Jun

£310 + VAT CLT Members/£495 + VAT Non-members

# Understanding and Managing Intellectual Property Disputes

Foundation | 5 hours CPD

This course provides an introduction to intellectual property disputes. It is aimed at in-house Counsel who need to understand how to manage IP disputes and also at litigators who are looking to develop their IP practice.

IP "Associate to Watch" Martin Noble will identify how disputes arise and how to assess the strength of your own or an opponent's position. It will also assist in formulating a strategy for dealing with the dispute. Delegates will have the opportunity to work through practical case studies in order to see how IP law works in the real world. Topics covered include:

- Assessing IP rights, their ownership and validity
- Pre-action and interim relief, including pre-action disclosure, Norwich Pharmacal orders and interim injunctions
- Letters before action
- ADR
- Issue of proceedings and statements of case
- Disclosure, witness statements
- Expert evidence
- Inquiry as to damages/account of profits
- Trial
- Costs

Speaker: **Martin Noble** is a legal director of Shakespeares Legal LLP. Martin has managed IP disputes across jurisdictions, in the English High Court, the Intellectual Property Enterprise Court and through ADR. He also advises on IP aspects of commercial deals and exploitation of rights. Martin is rated by *Chambers 2014* as an 'Associate to Watch' for Intellectual Property and described as "excellent in every respect."

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London 16 Jun

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£210 + VAT CLT Members/£450 + VAT Non-members

# Contentious Probate: Current Issues and Problem Areas for Practitioners

Intermediate | 5 hours CPD

Contentious probate is an expanding area of practice. This course equips practitioners to advise personal representatives, beneficiaries and potential claimants with confidence and is equally suitable for contentious and non-contentious probate practitioners and civil litigators who seek a greater understanding of the issues involved.

It will include a review of developments and relevant case law over the last five years, a consideration of preparation of cases, and practical obstacles and how to overcome them.

The course will cover:

- The probate jurisdiction of the court
- Issues as to formal validity of wills: testamentary intention and due execution
- Probate claims based upon testamentary incapacity, want of knowledge and approval, undue influence and forgery
- Interest claims
- Evidence
- Practice and procedure in probate claims
- Costs in contentious probate claims.

Speaker: **Luke Harris** is a barrister practising at 3 Stone Buildings. Luke has a wide-ranging commercial chancery practice with a particular emphasis on claims involving chattels and bailment, trusts, contentious probate, the administration of estates, claims under the 1975 Act and property including constructive trusts and proprietary estoppel.

“ A splendid day ”

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London 15 May  
Manchester 21 May

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£210 + VAT CLT Members/£450 + VAT Non-members

## Contentious Probate and Will Disputes: Developing Your Knowledge

Foundation | 5 hours CPD

Unlike some other litigation, contentious probate and will disputes are increasing year on year. This course is designed for litigators who wish to develop their knowledge in this field and enable them to start to build a practice in an area which is both interesting and challenging in equal measure.

The course will cover both legal and practical issues:

- Different types of claim • Probate and intestacy • Standing searches, caveats, warnings and appearances • Challenging a will • Inheritance Act claims: factors to consider, pre-action steps, the effect of prenuptial agreements, dispositions intended to defeat claims • Cost and case management • When to mediate and when not to?
- Costs: usual rules and exceptions, Part 36 offers and conduct of parties.

Speaker: **Richard Land** is a partner with Owen White and Catlin LLP and head of the litigation department dealing with contentious probate and other claims. He has extensive experience in dealing with Inheritance Act claims and possession claims on behalf of executors.

**“ Brilliant course covering everything needed for basic understanding of contentious probate to developing practical understanding and applying to actual scenarios ”**

London	2 Feb
Manchester	4 Feb

£210 + VAT CLT Members/£450 + VAT Non-members

## 1975 Act and Other Claims Against PRs

Intermediate | 5 hours CPD

This course will equip private client practitioners and experienced litigators with a comprehensive but practical understanding of claims under the Inheritance (Provision for Family and Dependents) Act 1975 and other causes of action often deployed to acquire an interest in an estate. It will also cover actions PRs may bring against third parties and the resolution of administration disputes with beneficiaries and an in-depth discussion on costs, concentrating on the special rules and categories used by the courts in estate litigation, with particular emphasis on the various steps that should be taken with a view to protecting the client's position on costs.

Attendance on this course will concentrate on recent interesting cases, which will leave delegates confident that their knowledge is up-to-date.

The course will cover:

- Claims under the Inheritance (Provision for Family and Dependents) Act 1975
- Proprietary estoppel
- Constructive trust claims over land
- Undue influence
- Mutual wills and secret trusts
- Rectification and construction
- Administration actions, disputes over accounts and removal of PRs
- Practice, procedure and costs

Speaker: **Edward Hewitt** is a member of 3 Stone Buildings. He practices in a range of Chancery areas specialising in trusts and estates, both from an advisory and litigious perspective as well as real property and insolvency.

Leeds	21 Apr
London	23 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

### Consumer Law Update 2015 **NEW**

Update | 6 hours CPD

Following last year's significant changes in the field of consumer law, this course will look at how the developments are bedding in, and particularly the implementation of the Consumer Rights Directive which heralded changes for all those providing goods and services.

The course will consider a range of topics across consumer law including:

- Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013
- Consumer Protection from Unfair Trading Regulations 2008 (criminal and civil aspects)
- Business Protection from Misleading Marketing Regulations 2008
- Undertakings and enforcement orders under the Enterprise Act 2002

It will also look ahead to the enactment of the Consumer Rights Bill, expected to be in force in the autumn of 2015

Speaker: **Deborah Parry** is a freelance consumer law author and lecturer. She is Honorary Fellow of the Law School, University of Hull where she was a Senior Lecturer for 15 years. Deborah has contributed to programmes on Channel 4 (Dispatches), BBC (Panorama, Watchdog, Watchdog Daily and Your Money Their Tricks) and BBC Radio 4 on consumer topics. She edits and contributes to *Butterworths Trading and Consumer Law* and has written a number of leading texts and a wide range of legal papers on consumer law topics.

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London      23 Jun

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£210 + VAT CLT Members/£450 + VAT Non-members

### Consumer Credit Litigation: The Changes

Intermediate | 3 hours CPD

This course provides a practical and informed review of the landscape of consumer credit law. You will gain an understanding of how to both challenge and defend regulated agreements.

The course will focus on:

Where are we now?

- The meaning of 'credit'
- What constitutes 'enforcement'
- Default fees
- Interest rates
- Default notice errors
- Conduct of CMC litigation, including costs liabilities in unsuccessful cases
- Consumer Credit Directive changes

Hot topics for the litigator

- Unfair relationships/PPI cases
- OFT irresponsible lending guidance/FAO's
- The Consumer Regulatory Reform Consultation
- The Financial Conduct Authority
- SRA approach to 'CMC' litigation

Speaker: **Richard Humphreys** is a partner in charge of the litigation section of the finance and leasing team at Blake Lapthorn. His clients include banks, independent finance institutions and manufacturer subsidiaries.

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London      27 Apr pm

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£140 + VAT CLT Members/£300 + VAT Non-members



## Legal Aid Supervision: An Introduction

Foundation | 7 hours CPD

This course has specifically been designed for those who are stepping into the role of legal aid supervisor or deputy for the first time. The course has been written with the demands upon supervisors under the SQM and legal aid contracts in mind, and explains the role of the legal aid supervisor and the management skills needed to be effective.

Course content:

- It meets the generic requirements for supervisor status on page 1 of the LAA Supervisor Form • Meets the requirements of the 2015 own and duty crime contracts
- Covers supervision requirements in the 2013 legal aid contract • Covers SQM 2013 and Lexcel 6 requirements for supervision and file review • Practical supervision - day to day techniques for better file compliance • Hints and tips for dealing with legal aid audits • Building relationships and credibility • Time management.

Outcomes focused regulation makes the effective running of the firm a matter of professional conduct. It requires effective systems for supervision, risk management and delegation, and expects training to ensure the competence of all personnel in performing their duties. This course will help you meet this requirement.

Speakers: **Vicky Ling**, BSc MPhil, is a specialist legal aid consultant, member of the Low Commission and formerly managed a CAB, a law centre and a housing advice centre, as well as implementing the then Legal Aid Board's quality assurance standard.

**Matthew Moore** is the Director of Consultancy Services with Infolegal Ltd – specialist compliance and practice management advisers to the legal profession – and is also a consultant solicitor with the regulatory specialists Jayne Willetts & Co.

Bristol	4 Feb
Manchester	11 Feb
London	18 Feb
Leeds	25 Feb

£210 + VAT CLT Members/£450 + VAT Non-members

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**12 February 2015**  
**Central London**

**Fees: £415 + VAT CLT Members/ £525 + VAT Non-Members**

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The law surrounding credit hire is in constant flux with new cases and the changes to statute continuing to affect this field.

Whether you are claimant or defendant, understanding the law and how the changes impact on your case is absolutely invaluable bearing in mind that even more change is on the horizon. 2014 saw a full review of the credit hire principle by the CMA gave their verdict on the market.

This conference will look at what impact this may have on the future of this industry.

## **Chair**

Craig Budsworth has dealt with credit hire for over two decades and has specialised in credit hire recovery from the claimant side when he joined Glaisyers in 1997 and recently joined True Solicitors as their Birmingham branch manager. He has a passion for credit hire and regularly runs training days on the subject. He was short listed for 'Legal Executive of Year' in 2008 and one of the first legal executives in the country to be made a partner. He became Chairman of MASS in 2012 and was awarded the CILEx Presidents Medal the following year.

## **Speakers**

Christopher Perry was called to the Bar by Lincoln's Inn in 2002 and completed pupillage at a leading common law set in London. He additionally completed the conversion requirements to qualify as a Solicitor and therefore holds dual qualification. Chris was one of the first barristers to be authorised by the Bar Standards Board to conduct litigation.

Gavin Perry has 22 years' experience in dealing with motor and other personal injury work, but specialises in defending Credit Hire claims for Insurers. Gavin is based in the Liverpool office of DWF but is responsible for the credit hire defence work in our other offices as well.

Barry Simpson was called to the Bar by Lincoln's Inn in 2006 and was also admitted as a Solicitor of the Senior Courts in October 2012. He has worked at three large national law firms dealing with credit hire litigation on a day to day basis. He has also conducted bulk negotiation settlements between insurers and credit hire companies.

Steven Smith holds dual qualification as a Barrister and Solicitor and has over 12 years experience in dealing with civil litigation claims with a particular specialisms in credit hire matters, both Claimant and Defendant, costs and personal injury. In addition, Steven is a director of the ABS, Principia Law Limited.

Charlie Williams heads up Weightmans' dedicated national Credit Hire teams, having previously been the Operations Manager of the motor arm of their Counter Fraud Group. As well leading the Credit Hire teams he is also involved in strategic litigation of Insurance Fraud and Credit Hire claims.

## 9.00

### 9.30 Chair's Welcome and Introduction

*Craig Budsworth, True Solicitors*

### 9.45 Current Issues and Recoverability

Setting the scene for the day ahead by outlining some of the most recent case law | What's changed in respect of legislation for signing hire contracts.

*Craig Budsworth, True Solicitors*

### 10.30 Credit Hire – The Defendant's Perspective

Credit Hire post CMA | Claims for hire in the MOJ | Credit Repair | Diminution claims post *Coles* and diminution of lease vehicles.

*Gavin Perry, DWF Solicitors*

### 11.15 Refreshments

### 11.30 Impecuniosity and Basic Hire Rates

Impecuniosity: the variance in Court | Basic Hire Rates: claimants perspective format | Basic Hire Rates: defendants perspective format | Statistics: ABI-GTA vs Basic Hire Rates.

*Barry Simpson, SurveyorShip*

### 12.15 The View from the Bench

Judges attitudes to credit hire claims | Changes in approaches 2014 to 2015 | Different Courts, different decisions? | Judges and evidence | The bench and credit hire moving forwards.

*Christopher Perry, Palmyra Chambers*

### 1.00 Questions

### 1.15 Lunch

### 2.15 Taxis and Fleet Claims

Who can hire when there is a taxi fleet involved? | Impecuniosity and its impact on a self-employed taxi driver | Should a taxi driver be entitled to hire a replacement taxi or should they claim loss of earnings?

*Craig Budsworth, True Solicitors*

### 3.00 Refreshments

### 3.15 Practice and Procedure for Claimants and Defendants

Pre action procedure | Disclosure | Evidence & witness statements | CPR 3.9 - the changes - Denton, Decadent and Utilise | Tactics | Costs and Credit hire.

*Steven Smith, Palmyra Chambers*

## An essential update for all practitioners involved in this fast evolving area

### 4.00 Fraud Update

Fundamental dishonesty (the past, the present and the future) - What is meant by fundamental dishonesty? - The Court's view - how have the courts interpreted and applied the concept of fundamental dishonesty? - What does The Criminal Justice and Courts Bill hold for us?

*Charlie Williams, Weightmans*

### 4.45 Chair's Concluding Remarks and Questions

## 5.00

### Personal Injury Update 2015

Update | 6 hours CPD

This course will provide you, as a busy personal injury practitioner, with a comprehensive update and some suggestions for an innovative approach to personal injury litigation. It will provide greater awareness of current authorities in the Supreme Court and Court of Appeal and the changing landscape on public policy. The course will also look at practical solutions for practitioners and doing the best for your client. You will gain a working knowledge of the Ogden Tables and issues relating to life expectancy.

The course will include an overview of:

• Essential Procedural Updates • Service • Part 36 • Admissions • EL Regulations • Work Equipment • Construction Regulations • Employers Liability • Vicarious Liability • Protection from harassment • RTA • Insurance Issues - Road Exclusions Pleading fraud • General Liability Issues • Occupiers Liability • Public Liability • Suicide • Criminal Liability for Accidents at Work • Illness and Disease • Pleural Plaques • Asbestos • Funding • CFA's • Quantum Update.

Speaker: **Pankaj Madan** is a personal injury and clinical negligence barrister practising from Exchange Chambers, Leeds and 12 King's Bench Walk, London. He sits as a deputy district judge.

Or **John-Paul Swoboda** Barrister, specialist Personal Injury Counsel at 12 King's Bench Walk, London.

Manchester	3 Mar
Bristol	10 Mar
Leeds	17 Mar
London	24 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

### Occupiers', Employers' and Public Liability

Update | 5 hours CPD

**Accredited by APIL Training**

This course addresses key liability issues and common themes in occupiers', public and employers' liability scenarios.

The course will enable PI practitioners to improve their knowledge of the legal principles and their application through a review of recent case-law and analysis of public policy indicators. We will consider the common law and statutory liability of occupiers, highway authorities, employers and others for negligence by reference to the specific allegations which might be made and the defences available. Case-studies and exercises will bring the topics to life and give an interactive dimension to the course. It will include:

• Occupiers' liability for different premises and the different requirements  
• Comparing and contrasting the OLA Statutes 2107 and 1984 together with recent case law  
• The defences available  
• The imposition of responsibility and liability upon Highway Authorities including a review of relevant law and case law  
• The employer's statutory liabilities including a review of the relevant regulations and case law  
• The employer's liability to others for the deliberate wrongdoing of employees including assault cases  
• Current trends and case law update.

Speaker: **Andrew McLoughlin**, Solicitor, has been granted Higher Rights of Audience for Civil and Criminal proceedings and sits as a recorder in the Crown and County Courts. Andrew has been described by a previous delegate as 'an extremely erudite and knowledgeable gentleman with a sharp sense of humour. An absolute joy to learn from. Truly outstanding'

Manchester	12 May
Newcastle	13 May
London	14 May

£210 + VAT CLT Members/£450 + VAT Non-members

## Industrial Disease - Developing your Skills **NEW**

Intermediate | 3 hours CPD

### Accredited by APIL Training

The past couple of years have presented significant challenges for personal injury practitioners. Those who survive and prosper post-LASPO are adapting their practice and developing new specialisms. This course gives a general personal injury practitioner an explanation of industrial disease work and will demonstrate how to add new skills and value to your professional practice.

Topics covered:

- Mesothelioma and other lung disease claims
- Noise induced hearing loss
- Work related upper limb disorders
- Occupational stress
- Pitfalls to avoid
- Limitation – trips and tips
- Establishing breach of duty
- Multiple defendants
- Dealing with the Portal
- Implications of the Jackson reforms

Speaker: **Gareth Shires** has a busy personal injury practice acting for both defendants and claimants. His practice encompasses multi-track litigation including significant injury, industrial disease and clinical negligence matters. He also undertakes all aspects of fast track work.

Manchester	4 Jun pm
London	11 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

## Damages - Dealing with Higher Value PI Claims

Intermediate | 6 hours CPD

### Accredited by APIL Training

This workshop is designed to provide those moving on from lower to higher value PI claims with a thorough and practical grounding in assessment of damages and the relevant practice and procedure.

It will suit both claimant and defendant practitioners and will examine the following, by reference to recent case law:

- Types of injury
- Problems with causation
- Choosing appropriate experts
- What are the heads of damage?
- Putting together a schedule
- The defendant's perspective
- Types of damages awards
- Interest
- CRU

Speaker: **Francis Treasure** is a member of Chambers at 42 Bedford Row, London, where he practises in common law, specialising in professional negligence and personal injury.

London	12 May
Manchester	13 May

£210 + VAT CLT Members/£450 + VAT Non-members

# 29 January 2015

## Central London

**Fees: £415 + VAT CLT Members/ £525 + VAT Non-Members**

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Clients who have suffered injuries resulting in the receipt of damages have often gone through a traumatic and difficult experience before they reach your offices. This may leave them feeling particularly vulnerable and so it is of crucial importance that the personal injury and private client lawyers assisting them have up to date and accurate knowledge to ensure that, at least in financial terms, clients can trust that the best course of action is taken. Many clients state that this can enable them to draw a line under the past and start looking towards the future.

Help is at hand for those practitioners who need some guidance in navigating the many issues that arise when advising clients about the handling of their damages. Join our dedicated experts who will guide you through this process starting with an overview of PI trusts before looking in more depth at the creation and management of the trust, a case law update, a consideration of PI trusts and mean-tested benefits, problem areas, options for damages, future PI costs and what to do if your client is mentally incapable. The day will conclude with a Q & A session and some all-important marketing tips!

### *Chair*

Michael Knott, is a partner of Irwin Mitchell LLP and a Director of IMTC and IMTL; He heads the Court of Protection departments in Bristol, Birmingham and Newcastle. He has over 20 years' experience as a lawyer in national and international law firms specialising in all aspects of Private Client Law. His specialism and that of his teams is identifying and dealing with the best possible legal structure within which personal injury and clinical negligence damages can be managed.

### *Speakers*

Joanna Grewer specialises in all aspects of Court of Protection work and is the UK manager for personal injury trusts for Irwin Mitchell. She is the Associate Manager of the Birmingham office. Jo identifies and deals with the best possible legal structure within which personal injury and clinical negligence damages can be managed. – either through the medium of a Court of Protection Deputyship or a Personal Injury Trust. She has particular experience of dealing with complex, high value awards. Jo joined Irwin Mitchell last year having worked in the private client field for over 10 years. She is STEP qualified.

Edward Tomlinson is a Financial Adviser with IM Asset Management. He has a Bachelor of Science in Mathematics from the University of Sheffield, and has been awarded Chartered Financial Planner status, the highest accreditation awarded by the Chartered Insurance Institute. Edward is a member of the advisory team at IM Asset Management and is responsible for formulating client specific financial strategies. Edward is also responsible for providing the Courts with advice on the structure of claimant's settlements and has appeared in Court on behalf of claimants.

Alan Robinson was a Principal of his own firm for over 30 years specialising in elderly client, and is now a Consultant. He has worked in the area of community care since its inception and currently teaches community care law for The Open University. He is also a contributor to Tottel's Older Clients Law Service.

Jim Tindal is a former Solicitor and has now been at the Bar for 12 years. He has developed an expertise in cases of people with serious injuries, illnesses and disabilities. Jim practises exclusively for Claimants and is regularly instructed in brain injury cases. He appeared in an 'old scheme' CICA common law damages hearing relating to a permanently brain injured child claimant valued over £5m involving life-long loss of earnings and care and rehabilitation and the inter-relationship between damages and the availability of local authority care. He has an expertise in Court of Protection cases and his cases have featured issues of capacity, welfare decisions, medical treatment and property and affairs for injured clients.

## 9.00

### 9.30 Chair's Welcome and Introduction

*Michael Knott, Irwin Mitchell*

### 9.40 Personal Injury Trusts – An Overview

*Michael Knott, Irwin Mitchell*

### 10.20 Practical Points on Creating and Managing the Trust

Taking instructions | Drafting | Banking and investments | On-going considerations.

*Joanna Grewer, Irwin Mitchell*

### 11.00 Refreshments

### 11.15 Case Law Update

SM and HM Case 2 years on | New cases.

*Jim Tindal, St Philips*

### 12.00 PI Trusts and Means-Tested Benefits

DWP and local authority benefits, including long term care | 52 Week Rules | What can the trust pay for now?

*Alan Robinson, Cross Key Associates*

### 12.45 Questions

### 1.15 Lunch

### 2.00 Problem Areas

PI trusts and fatalities cases | PI trusts and professional negligence cases | Awards for past care | Personal injury trusts and awards for future care | Death | Minor trusts.

*Joanna Grewer, Irwin Mitchell*

### 2.30 The Discount Rate, What It Is, Why it is Being Reviewed and Why That Affects You

What is the discount rate | History of the discount rate | Why is the lord chancellor reviewing the discount rate | What options does the lord chancellor have.

*Ed Tomlinson, Irwin Mitchell Asset Management*

### 3.00 Refreshments

### 3.15 Future PI Costs

Projecting the costs of managing trusts.

*Michael Knott, Irwin Mitchell*

## PI Trusts: Creation and Duration

### 4.00 The Mentally Incapable Client

Approaching the Court of Protection | Principles of the Mental Capacity Act 2005 – | Court of Protection v Trust | Using a Trust on restoration.

*Joanna Grewer, Irwin Mitchell*

### 4.45 Chair's Concluding Remarks and Questions

## 5.00

## Inquests: Guidance from a Coroner

Hot  
Topic

Intermediate | 3 hours CPD

Accredited by APIL Training - Litigator, Senior Litigator

Substantial changes to the coronial law were introduced in July 2013 and this course provides a comprehensive guide to the new law for practitioners advising or representing potential claimants, defendants, witnesses or family members where a death has arisen. It will be particularly useful for personal injury and clinical negligence lawyers. The course will cover:

- The reforms to coronial law including the role of the Chief Coroner
- The functions of the Coroner, including control of the body
- Processes designed to hasten inquiries and the listing of inquests
- Preparation for and procedure at the inquest including improved disclosure
- Funding of representation
- The scope and purpose of the inquest
- The expanded remit of the inquest under the Human Rights Act
- Verdicts including neglect, unlawful killing and narrative

Speaker: **Sheriff Payne** is HM Senior Coroner for Bournemouth, Poole and county of Dorset and has many years of coronial experience having previously been appointed Deputy Coroner in 1983. He also has had litigation experience in a busy private practice.

London	6 Mar am
Manchester	19 Mar am

£140 + VAT CLT Members/£300 + VAT Non-members

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# Certificate in Commercial Contract Drafting

Foundation | 12 hours CPD

This 2-day course is aimed at solicitors with little or no experience of drafting commercial contracts. It will be of particular interest to those who are working in-house and will also be a useful refresher to those returning from a career break.

The course equips delegates with the essential knowledge and skills that they need to negotiate and draft a commercial agreement. It will look at frame agreements, standard terms, purchase orders and web contracting.

The first day focuses on the key legal concepts underpinning commercial contracts. On the second day, delegates will learn negotiation skills and get the opportunity to apply their knowledge in case studies. The course is presented by Helen Swaffield, barrister and qualified teacher, who has extensive experience of training in-house contracts lawyers and consistently receives excellent feedback.

## Day 1

### How to draft a contract

- The parties, the price and the content of the goods or services, scope and duration
- Delivery and quality, obligations of means eg. endeavours
- Setting up different types of agreements
- Using a frame agreement
- Service levels
- Warranties, indemnities guarantees
- Risk management: liquidated damages, and exclusion clauses
- IPR, licences, background and foreground
- Termination and liability and waiver
- Boiler plate: severability, third parties, amendment, confidentiality, notices, force majeure, entire agreement and jurisdiction
- Agreements with the consumer and other agreements which require care including restrictions of competition

## Day 2

### Case studies

- Services contracts under a frame agreement
- Goods contracts and sub-contracts

### How to negotiate

- Understanding the leverage
- Styles and tactics
- Track change issues
- Authority and capacity

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at St Ives Chambers, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.



*The course was very detailed, thorough and well presented.*



**Leeds**  
**London**

**2 - 3 Mar**  
**16 - 17 Apr**

£495 + VAT CLT Members/£795 + VAT Non-members

# Essential Toolkit for In-house Counsel **NEW**

Foundation | 12 hours CPD

This two day course is aimed at solicitors moving in-house for the first time and will also provide a useful refresher for those returning from a career break. It gives an overview and update of the areas of law in which your advice will most commonly be sought. The course also provides invaluable advice on integrating the legal team into a business and “selling” its value to your internal client. The course is not intended to deal with commercial contracts and solicitors who do not have a background in commercial contracts may also wish to attend the 2 day Certificate in Commercial Contract Drafting.

### Day 1

- Company Secretarial - the fundamentals
- Intellectual Property - understanding, protecting and enforcing - inventions and patents - trade marks and passing off - copyright and database rights - design rights - confidential information
- Data Protection - key principles - auditing the business
- TUPE - when does it apply? - what rights does it create?

### Day 2

- Competition law - what can and can't you do? - vertical block exemption - Implementing a competition compliance programme - preparing for a dawn raid
- UK Bribery Act overview and a practical guide to achieving compliance in your organisation
- Selecting and managing professional advisers
- Information technology to help the in-house lawyer
- Client care and selling the value of an in-house team

Speaker: **Iain Larkins** founded Radius Law in September 2013 to provide commercial legal services. Prior to that, Iain was an in-house lawyer for 14 years; he was General Counsel and Chief Compliance officer for the Mercedes-Benz UK Group from 2006 -2013 in which role he led a team of 18 staff, implemented large scale compliance programmes and also managed regulatory investigations.

**“ Iain Larkins was a great presenter. His anecdotes from his time as a GC were very insightful and helpful. ”**

London

10 - 11 Mar

£495 + VAT CLT Members/£795 + VAT Non-members

## Certificate in Insolvency Law

Foundation | 6 hours CPD

This course is primarily aimed at practitioners in other fields who come across insolvent situations in their practice and wish to develop their knowledge and experience.

It will include:

- An introduction to the different insolvency regimes
- Using insolvency as a litigation recovery tool
- Pre-pack administrations
- Litigating for and against insolvency practitioners
- Piercing the corporate veil; getting at the directors personally
- Getting the most out of the insolvency practitioner
- Funding insolvency litigation

Speaker: **Stephen Allinson** is Chairman of the Joint Insolvency Examination Board. He is a Consultant with Lester Aldridge Solicitors as well as lecturing and presenting. He has for many years been recognised as a 'leader in his field' by legal directories. He regularly contributes to professional publications and has written a leading text on Debt Recovery.

**Excellent presentation. Great Interaction.  
Speaker very engaged**

London 22 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

## Converting Your Practice to Employment Law

Foundation | 6 hours CPD

This one day course provides fee earners who currently practise in other areas of law with a cross-over day into employment law and practice. It is geared to lawyers who want to build up their knowledge in this area. The course assumes no prior knowledge of employment law but is reasonably fast paced to cover the most common elements of practice.

Topics to be covered include:

Terminating the employment relationship • Wrongful dismissal • Constructive dismissal • Tribunal practice and procedure • Drafting ET 1 and ET3 • The law of compromise- negotiating settlements • Drafting compromise agreements.

Claims in unfair dismissal and redundancy • Bringing and defending a claim • The threshold criteria • Defences • The ACAS Code of Practice • Disciplinary procedures • Compensation • Individual rights on redundancy • Duties to consult • Compensation.

Discrimination • Direct discrimination • Harassment • Indirect discrimination • Age and disability discrimination • Reasonable adjustments • recent statutory developments - the Equality Act - new policies and procedures.

TUPE 2006 • Identifying a business transfer in disposals and acquisitions of business • The implications of the application of TUPE • The rights of employees dismissed before or after a business transfer to which TUPE applies • Bringing and defending a claim.

Speaker: **Lorna Valcin** is a legal consultant for Compromise Agreements Limited and a regular lecturer for CLT. She was rated as a 'notable practitioner' in Chambers and described as 'easy to get hold of and has a methodical approach to work'.

London 29 Jan, 20 May  
Birmingham 5 May  
Manchester 12 May  
Leeds 27 May

£210 + VAT CLT Members/£450 + VAT Non-members

# Private Client Conversion Course

Foundation | 27 hours CPD

This course is designed to bring delegates up to a basic level of competence in private client work. It is suitable for practitioners in any field wishing to change specialisms and also for trainees as it assumes no knowledge at the outset. There will be practical exercises and case studies throughout with plenty of opportunity for questions and discussion.

Accompanying the course materials will be a resources pack with forms, guidance and other materials.

### Day 1: Will Drafting

Includes structure and specific clauses, IHT and CGT and variations and disclaimers.

### Day 2: Trusts

Includes principles and essential elements for creating trusts, taxation and drafting lifetime trusts.

### Day 3: Advising Elderly Clients

Includes the Mental Capacity Act 2005, the Code of Conduct, assessing mental capacity, Lasting Power of Attorney forms and nursing care funded by NHS.

### Day 4: Probate and Administration of Estates

Includes, property passing outside the Will/intestacy, preparing the IHT205/ IHT400, oaths, tax during the administration of estate, finalising IHT and estate accounts.

### Day 5: morning only

Workshop of practical exercises and case studies.

Speakers: **Caroline Bielanska** is the former Chief Executive of Solicitors for the Elderly, an organisation she helped to found. She now provides consultancy for law firms on an independent basis, sits on the Court of Protection User's Group and sat on the formal Court of Protection Rules committee and **Anthony Miller** is a training consultant specialising in probate and the administration of estates and trusts. He qualified with the Institute of Financial Services (Trustee Diploma) and is a full member of The Society of Trust and Estate Practitioners (STEP). He has obtained the Diploma in Training Practice with the Institute of Personnel and Development. Anthony is a tutor and author for the STEP Administration of Estates paper and speaks on a number of other legal courses and **Martyn Packer**, BA (Hons), LL.M., Solicitor, who worked in private practice as a probate and trusts lawyer. He is now a freelance training consultant in the fields of probate, will drafting and private client work and **Joe Swift**, FCA, FCCA, ATII, TEP, Dip PFS, Consultant with Addleshaw Goddard, which is one of the largest firms of solicitors in England with a private client department and formerly a tax partner at Deloitte. Joe has lectured widely on tax and estate planning to various professional groups and clients.

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London

2 - 6 Feb, 8 - 12 Jun

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£1,750 + VAT CLT Members/£1,195 + VAT Non-members

# Residential Property: An Intensive Introduction for Qualified Practitioners

Foundation | 6 hours CPD

This intensive and practical course is aimed at those qualified practitioners looking to change practice areas (for example, due to Legal Aid cuts) or for those returning after a career break. No prior knowledge of conveyancing (residential or otherwise) is required!

The course will provide a practical overview of residential conveyancing and the pitfalls which may occur on a daily basis in today's market including:

- An overview of the conveyancing transaction
- Identifying your client and the source of funds - why this is your responsibility
- Review of searches available in the market online or paper based?
- Conveyancing Quality Scheme - what is it all about?
- The Protocol and the new forms
- Key risk areas - CML and your duty to the lenders
- What is SDLT? how does it differ from stamp duty?
- Standard Conditions of Sale (5th edition)
- Changes in Land Registry practice - where did office copies go?

The course is supported by clear flowcharts of the residential conveyancing process.

Speaker: **Lorraine Richardson**, MA (Cantab), Solicitor, specialises in residential conveyancing and wills and probate in a practice in Suffolk. She is a co-editor of the Law Society publication, *Conveyancing Forms and Procedures*.

London	16 Feb
Birmingham	23 Feb
London	8 Jun
Manchester	15 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

# An Introduction to Commercial Property Litigation: Part One

Foundation | 6 hours CPD

This course is aimed at lawyers from a contentious background who are looking to build a practice in commercial property litigation. It will not deal with residential property disputes save in the context of mixed use developments.

The course will provide a useful overview of the Landlord and Tenant Act 1954 from which much of the bread and butter work of the commercial property litigator flows, yet contains many traps for the unwary. It will also focus on some of the most common areas in which disputes arise.

The course will include:

- The basic concepts of 1954 Act
- Statutory notices under 1954 Act
- Overview of court procedure
- Service charges
- Enforcement of leasehold covenants
- Break options

Speaker: **Mark Shelton** is a professional support lawyer with Eversheds LLP. He qualified with Linklaters and has always specialised in property litigation. Mark was a partner at Lawrence Graham, and has acted for major property investors, financial institutions and leading retailers. He is a contributor to *Estates Gazette* and *Property Law Journal*.

Manchester	19 Mar
London	26 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

# An Introduction to Commercial Property Litigation: Part Two

Foundation | 6 hours CPD

This course builds on An Introduction to Commercial Property Litigation – Part One. The course will not deal with residential property disputes.

It considers procedures where the landlord opposes lease renewal on redevelopment grounds. Dilapidations claims, which are increasingly prevalent, are covered in some depth.

The course will include:

- Tactics and requirements for opposing lease renewal on redevelopment grounds
- The interpretation of repairing covenants
- The conduct and settlement of dilapidations claims
- Obtaining landlord's consents
- How tenants can offload over-rented property
- Trespassers
- Avoiding inadvertent waiver of the right to forfeit and a guide through the variety of relief jurisdictions
- A contrast between distress for rent and commercial rent arrears recovery

Speaker: **Mark Shelton** is a professional support lawyer with Eversheds LLP. He qualified with Linklaters and has always specialised in property litigation. Mark was a partner at Lawrence Graham, and has acted for major property investors, financial institutions and leading retailers. He is a contributor to *Estates Gazette* and *Property Law Journal*.

Manchester 23 Apr  
London 30 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

# Managing Litigation Effectively After Jackson

Intermediate | 6 hours CPD

Litigation skills have changed. The reforms require that litigators, and those who instruct them, must be more efficient and adaptive. This course develops project and case management tools that will be invaluable in litigation.

What is project management? • Project management tools introduced • Tailoring tools to the litigation context • Process planning to deadlines.

Case management • Task by task management strategies • Developing the costs benefit analysis • Merits and evidence assessment tools • Procedural strategies • 'Good cop'/'bad cop' approach • 'Without Prejudice' • Contingency planning - how to manage changing merits.

Client strategies • Reporting to clients and insights into communication • Allocation of roles and responsibilities • Hidden and unseen messages • 'Winning' re-defined • Commercial options.

Trial strategies • Court/arbitration familiarisation • Managing witnesses and experts.

Leadership • Leadership theories in action – which one is appropriate for you? • Managing a team from a distance (counsel, experts and witnesses).

Speaker: **Helen Swaffield** is a barrister with 20 years' experience in commercial litigation. Within her practice at St Ives Chambers, Helen works with government bodies and leading firms of solicitors on a range of commercial and in-house projects.

Birmingham 24 Apr  
London 22 May

£210 + VAT CLT Members/£450 + VAT Non-members

## Litigation Drafting - A Comprehensive Guide

Foundation | 6 hours CPD

This is a workshop course aimed at paralegals, trainee and junior solicitors. It provides the delegate with tuition through worked examples to improve drafting skills. It aims to increase your confidence in pleading statements of case and other documents for court which will allow you to keep more work in-house and increase profitability.

Topics covered include:

- Endorsing the claim form - avoid the pitfalls of Nomura
- Statements of case - contract/tort/breach of statutory duty
- Identifying the cause of action and avoiding abuse of process
- Defences and tactical drafting
- Part 20 claims
- Requests for Further Information - are they an own goal?
- Admissions: recent changes on when to use them
- Amendments: do's and don'ts
- Drafting witness statements - tips and traps
- Skeleton arguments demystified

Speaker: **Philip Barlow**, MB, ChB, MA, is a qualified doctor, barrister and solicitor. He has 15 years civil litigation experience managing a team of litigators, specialises in clinical negligence and is currently a partner in LawSolve LLP.

**“ A useful focus on this particular skill which is often used and practised but rarely properly taught ”**

**Birmingham** 4 Mar  
**London** 5 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

## Interviewing Witnesses: How to Unlock Their Memories

Intermediate | 6 hours CPD

Cognitive interviewing is a tool which can be employed by all litigators to maximise a client or witness's recollection of events. It uses a series of memory retrieval techniques to increase the amount of information that can be obtained from a witness or client. Cognitive interviewing is much more effective than simply asking questions, which interrupts the witness and restricts the natural flow of information.

This practical course, which is suitable for all litigators, trains you to use cognitive interviewing, which is successfully used in some of the largest UK law firms. Using cognitive interviewing will increase the completeness and accuracy of what your witnesses can remember, helping them to remember clearly things that happened many months, or even many years ago. It will also enable you to:

- Assess litigation risks and make decisions about a case
- Prepare cases and take statements based on the full facts
- Obtain up to 40% more relevant information
- Obtain uncontaminated evidence from witnesses
- Obtain more facts and details from witnesses first time, reducing the need for costly re-interviews

Speaker: **Dave Barney** specialises in training lawyers in interviewing and investigating techniques. He has trained over 3000 lawyers in the last 15 years and has worked with all of the top 10 UK law firms.

Or **Geoff Coughlin**, FITOL, CMCPD, has had wide experience of managing and training solicitors, managers, police officers and trainers in the private and public sectors.

**London** 12 Mar, 18 Sep

£210 + VAT CLT Members/£450 + VAT Non-members

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### A Year of Change: Key IP Cases in 2014

This webinar is aimed at in-house and private practice IP lawyers representing organisations and clients across all industries. It will highlight and comment on a selection of key English and European IP cases of 2014, including trade marks and passing off, copyright, designs and patents.

**Speaker: Ben Mark** is a Senior Associate in RPC's IP team. Ben advises on all aspects of intellectual property protection and enforcement, with a focus on trade marks, copyright and designs. Ben works with clients across a wide range of industries, including retail, online / e-commerce, financial services and insurance.

27 Feb | 1.00pm - 2.30pm

### An Update on Claims against Professionals

This webinar will be of interest to all practitioners who bring and defend professional negligence claims against solicitors and barristers, accountants, surveyors and other professionals. It includes a review of developments in the professional negligence field since mid-2013.

**Speaker: Catherine Burtinshaw** is a solicitor with 16 years of post qualification experience in the field of Professional Negligence from the Defendants' perspective.

3 Feb | 4.00pm - 5.30pm

### Challenging Arbitration Awards

The Arbitration Act 1996 provides a number of routes available to parties wishing to challenge an arbitral award, but succeeding on them has historically been difficult as the courts seek to uphold the finality of arbitral awards. This webinar examines recent developments in case law under ss66-69AA 1996 to see what lessons can be learned.

**Speakers: Clare Arthurs** is a professional support lawyer to Pennington Manches' commercial dispute resolution team and writes in the legal press and **Nicole Finlayson** is a senior associate in Pennington Manches' commercial dispute resolution team.

29 Jan | 1.00pm - 2.30pm

### Costs Budgeting and the New Format Bill of Costs

Cases that have been through the costs budgeting and management process are now starting to filter through to detailed assessment. This webinar will look back at the purpose and process of costs management, whether it is serving its purpose and some of the problems caused by budgets on detailed assessment and whether the new proposed bill format and J-Codes will solve the problems.

**Speaker: Jon Lord** Jon Lord is an Accredited Costs Lawyer and Mediator. He is Principal Costs Lawyer at Cost Advocates and a Council Member of the Association of Costs Lawyers. He sat on the ACL expert committee which reported on the proposed new format bill of costs in 2011.

26 Jan | 1.00pm - 2.30pm



## Dealing with the Legal Ombudsman

This webinar will be of interest to all practitioners who encounter The Legal Ombudsman either because their firm has been complained about, or through assisting clients in referring a matter to the Ombudsman. It will provide practical advice to assist in resolving complaints and building an effective complaints policy.

**Speaker: Catherine Burtinshaw** is a solicitor with 16 years of post qualification experience in the field of Professional Negligence from the Defendants' perspective.

**3 Feb | 1.00pm - 2.30pm**

## Early Determination: the shortest cut or the longest way round

This webinar examines the factors that you should consider when deciding whether you should seek early determination, in particular through preliminary issues, strike out or summary judgment.

**Speaker: Tom Henderson** is an associate in the dispute resolution team at Herbert Smith Freehills LLP. He has experience in a wider variety of cross-border commercial litigation matters.

**28 Jan | 10.00am - 11.30am**

## Part 36 and PI claims

Have the Jackson Reforms had any impact on Part 36 offers for the PI practitioner? You might be surprised. This webinar will assist both claimant and defendant practitioners in crafting and timing their Part 36 offers for maximum effect.

**Speaker: Andrew McLoughlin** is a Solicitor in Private Practice. He has been granted Higher Rights of Audience for Civil and Criminal proceedings and sits as a Recorder in the Crown and County Courts.

**18 Feb | 1.00pm - 2.30pm**



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## Part 36 in the post-Jackson era

The Jackson reforms have significantly changed the impact of Part 36 offers and their relationship to costs generally. This webinar will look at recent case law and provide tips on how and when to make a Part 36 offer.

**Speaker: Andrew McLoughlin** is a Solicitor in Private Practice. He has been granted Higher Rights of Audience for Civil and Criminal proceedings and sits as a Recorder in the Crown and County Courts.

**18 Feb | 10.00am - 11.30am**

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### Recent Developments in Litigation Funding

This webinar will be of interest to civil and commercial litigators, and costs lawyers. It focuses on a number of key topical issues that you may encounter including:

- Recoverability of success fees and ATE premiums: where are we now? (includes *Coventry v Lawrence*)?
- Damages-based agreements • Third party funding: recent developments • ATE insurance: a changing market place • Other recent developments, including qualified one-way shifting.

Speaker: **Rocco Pirozzolo** is a Solicitor and the Legal Expenses Underwriting Manager at QBE. He is a member of the CJC Working Party considering implementation of the Jackson Reforms.

2 Feb | 10.00am - 11.30am

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Speaker: **Ian Gascoigne** is a solicitor and a member of Eversheds LLP in its commercial dispute resolution group. He handles most forms of commercial litigation and has considerable experience of international arbitration. He trains lawyers on a variety of litigation subjects.

23 Jan | 1.00pm - 2.30pm

### Without Prejudice: Not Without Limits

"Without prejudice" communications are an essential element in the resolution of every dispute. But what are the limitations? Beware of always thinking your emails and letters to an opponent will be protected by this label. This webinar will consider the requirements and problem aspects of "without prejudice".

Speaker: **Ian Gascoigne** is a solicitor and a member of Eversheds LLP in its commercial dispute resolution group. He handles most forms of commercial litigation and has considerable experience of international arbitration. He trains lawyers on a variety of litigation subjects.

6 Feb | 10.00am - 11.30am

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Speaker: **Andrew McLoughlin**

## **Claims Against Directors**

Speaker: **Tony Sampson**

## **Claims Against the Police post Worboys**

Speaker: **Mariel Irvine**

## **Claims in Personal Injury for Child Abuse**

Speaker: **Richard Davison**

## **Commercial Agents Regulations: What You Need to Know**

Speaker: **Christopher Tayton**

## **Commercial Rent Arrears Recovery - Six Months in**

Speaker: **Mark Shelton**

## **Coronial Reform: What You Need to Know**

Speaker: **Lucy Wilton**

## **Costs and Insolvency: Making Sense of This Confusing Area of Law**

Speaker: **Stephen Allinson**

## **Costs and Jackson: The First 12 Months**

Speaker: **Matthew Smith**

### **Costs in Contentious Probate Proceedings**

Speaker: Richard Dew

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Speaker: Andrew McLoughlin

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Speaker: Michael Salter

### **Disaster, Frustration and Force Majeure**

Speaker: Simon McArdle

### **Drafting Witness Statements in the post-Jackson World**

Speaker: Gordon Exall

### **Enforcement of a Judgment: The new Regime 6 months on**

Speaker: Stephen Allinson

### **Essential Contract Law Update Autumn 2014**

Speaker: Helen Swaffield

### **Exchanged Contracts - What Can Go Wrong Now?**

Speaker: Lorraine Richardson

### **FCA Enforcement: Lessons from the First Year**

Speaker: Elaine Penrose

### **ISDA® Documentation and Mis-sold Interest Rate Derivatives**

Speaker: Gary Walker

### **Is He Good For the Money? Profiling the Debt and the Debtor Before Enforcement**

Speaker: Stephen Allinson

### **Limitation and PI Claims: 10 Myths that Every Practitioner Should Know**

Speaker: Gordon Exall

### **New Guidance on Working with Expert Witnesses**

Speaker: Ian Gascoigne

### **Part 36 and PI Claims**

Speaker: John-Paul Swoboda

### **Penalty Clauses after Makdessi: a Re-formulation of the Dunlop Test**

Speaker: Helen Swaffield

### **Pre-Action and Third Party Disclosure and Norwich Pharmacal Relief**

Speaker: Jason Woodland

### **Precedent Help! Getting to Grips with Precedent H**

Speaker: Andrew McLoughlin

### **Preparing for Mediation**

Speaker: David Smith

### Professional Conduct for Litigators

Speaker: Jayne Willetts

### Relief From Sanctions: Is Mitchell Still Good Law?

Speaker: Jack Holborn

### Settlement Law and Practice

Speaker: Ian Gascoigne

### Statutory Demands and Winding Up Petitions - The Inside Track

Speaker: Jeremy Richmond

### Surviving Mitchell: What You Need to Know to Stay in Business as a Litigator

Speaker: Gordon Exall

### Signature and Execution of Documents: a Refresher

Speaker: Helen Swaffield

### Specsavers vs. Asda: Anatomy of a Trade Mark Dispute

Speaker: Antony Gold

### Sports Injuries: Understanding the legal issues

Speaker: Simon McCann

### Tenants' User Covenants - a Competition Law Issue

Speaker: Malcolm Dowden

### The Claims Portal: An Introduction

Speaker: Mark Shelton

### The Future Loss of Earnings of Catastrophically Injured Children

Speaker: Chris Gutteridge

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## *Elderly & Incapacitated Adults Courses*

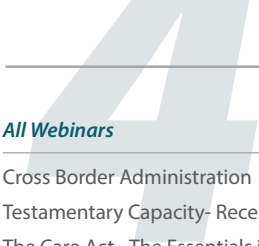
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Wills Quality Schemes:  
WIQS and STEP

Hot  
Topic

Update | 6 hours CPD

Increased competition and clients demanding transparency and excellent client service means it is more important than ever for will drafting firms with real expertise to find a way to demonstrate that specialist knowledge.

The WIQS and the STEP Code both aim to raise standards and ensure that participants deliver a quality service to clients. As both are relatively new, it is understandable that practitioners are seeking more information; in particular, what they offer and what they require of the participants.

This course covers all you need to know, including:

- Are you coming to terms with the STEP Code or the Law Society's quality scheme?
- How do the two compare including estate administration in WIQS?
- Are you considering joining WIQS; what are the pros and cons?
- Do you have one or more STEP members but need greater understanding of their Wills Code?
- Are you planning to employ a STEP member for the first time?
- What are the key practice issues needing proper attention?
- What lessons can we learn from WIQS, for practice, even if not proceeding?
- How can the more onerous rules be implemented most effectively?

Speaker: **John Bunker** is head of private client knowledge management for Thomas Eggar LLP, a role developed after 26 years with the firm specialising in wills, trusts, estate and tax planning. In more recent years he has developed regular training in these areas. He has worked extensively with financial planners and investment managers for mutual clients and has played a leading role in developing relationships with financial planners for the firm.

Leeds	12 Jun
London	25 Jun
Birmingham	26 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

Drafting Commercial Lasting Powers  
of Attorney **NEW**

Intermediate | 3 hours CPD

Company and Private Client Lawyers take heed! Legislative changes concerning company directors say; if they lack mental capacity they may not necessarily now be removed. This creates a quandary for a company, particularly their attitude to risk. Doing nothing could endanger the company; creating a Commercial LPA reduces the risk. Commercial LPA's can be used to manage decisions where a director is unavailable or away on business, just like an ordinary LPA or where they become incapacitated for longer periods of time or lack mental capacity.

This course will take solicitors through relevant company law; identifying business structures and drafting Commercial LPA's. Showing how different areas of law impact and how best to advise a company on making a Commercial LPA.

Topics covered

- Personal & commercial LPA clashes
- Directors: problems and removals
- Taking instructions
- Checking & adjusting business structures
- Applying current case law
- Drafting a Commercial LPA

Speaker: **Craig Ward** is a consultant solicitor and author. He has a degree in psychology and is a member of Solicitors For the Elderly and the British Psychological Society. He speaks internationally on elderly care law, mental capacity law, the Court of Protection and mediation. Craig mediates on commercial, probate and Court of Protection disputes and is the author of Who Cares (2012) Inspirational Press and Lasting Powers of Attorney: A Practical Guide (2nd Edition) (2011) The Law Society."

Manchester	16 Jun pm
Birmingham	17 Jun pm
London	18 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

# Will Drafting Masterclass

Masterclass | 5 hours CPD

In a time of increased competition anyone preparing wills needs to be confident in the quality of the product offered. This practical course covers the whole process starting with taking instructions; which is where things so often go wrong, then looking at planning points involved in wills for married couples, cohabitantes and the elderly and finally at detailed drafting points. It is designed to allow practitioners to take a fresh look at their drafting practices, particularly in the light of recent legislation and case law.

Mini-case studies and suitable precedents will accompany the materials and there will be opportunities for questions and discussion. The course will also provide a thorough review of negligence and best practice.

## Session 1: Taking Instructions: What do You Need to Know?

- Details of property owned including examination of case law surrounding proprietary estoppel, constructive/resulting trusts and bank accounts
- Details of family and dependants including possible claims under I(PFD)A 1975
- Any reason to question capacity/consider undue influence? Should you see earlier wills? *Kenward vs. Adams, Charles vs. Fraser*. What about the golden rule? *Key vs. Key, Wharton vs. Bancroft and Others*. What is undue influence: *Hubbard vs. Scott*? Liability for costs?

## Session 2: Planning the Will

- Spouses and children including advantages and disadvantages of using the transferable nil band, discretionary trusts and IHTA 1984, s.144 and flexible life interest
- Cohabitantes and children
- Opportunities and pitfalls of using pilot trusts?
- Property eligible for BPR-maximising relief, IHTA 1984, s.39A and double dip
- Are mutual wills ever a good idea?

## Session 3: Will Drafting

- Topping: revocation and foreign wills and will in expectation of marriage/formation of civil partnership
- Tailing: signature on behalf of testator and special attestation clauses
- People: executors and trustees, partners in firm, charging clauses, IHTA 1984, s.144 problems, exemption clauses, self-dealing and guardians
- Beneficiaries including survivorship clauses, charities and Wills Act 1837, s.33
- Non-residuary gifts including burden of IHT and NRB formula clauses
- Specific legacies including expenses of transfer and intermediate income
- Residuary gifts
- Reduced rate for charities
- Administrative provisions including Inheritance and Trustees' Powers Act and STEP Standard Provisions

*"Thank you very much. This was the best course I have been on. I have learned such a lot, thank you."*

Speaker: **Professor Lesley King**, Professional Development Consultant at the University of Law is co-author of *Wills, Taxation and Administration: A Practical Guide; A Modern Approach to Wills, Administration and Estate Planning (with Precedents); A Practitioner's Guide to Wills; Wills: A Practical Guide* and editor of *The Probate Practitioner's Handbook*. She is the wills and probate columnist for the *Law Society Gazette*, and writes and lectures extensively on wills, taxation and related matters.

Manchester	19 Feb
London	24 Feb, 19 May
Birmingham	20 May

£310 + VAT CLT Members/£495 + VAT Non-members



Best Seller

## Wills and Probate Update 2015

Update | 5 hours CPD

This course will acquaint private client practitioners with recent developments in the areas of will drafting, construction and interpretation, trusts and probate practice and related tax issues to ensure practitioners can apply these developments to their daily practice and be able to discuss the changes in an informed way with colleagues and clients. It will also look ahead to future developments.

The course will cover:

- Wills, trusts and probate cases and developments including: - Testamentary capacity - Interpretation and construction - Liability for negligent advice - Equitable remedies, rectification, rescission - *Hastings Bass and Mistake* - Constructive trusts and proprietary estoppel - Family provision claims - Income vs. Capital - Inheritance and Trustees' Powers Act 2014
- IHT cases and developments including: - Reliefs - Variations - Compliance - Miscellaneous tax issue - CGT cases - Compliance and guidance
- Future developments

Speaker: **Professor Lesley King**, Professional Development Consultant at the University of Law is co-author of *Wills, Taxation and Administration: A Practical Guide*; *A Modern Approach to Wills, Administration and Estate Planning (with Precedents)*; *A Practitioner's Guide to Wills*; *Wills: A Practical Guide* and editor of *The Probate Practitioner's Handbook*. She is the wills and probate columnist for the *Law Society Gazette*, and writes and lectures extensively on wills, taxation and related matters.

Or **Nick Shaw** MA (Cantab), TEP is a consultant with the trust and tax team at Addleshaw Goddard.

London	5 Mar
Leeds	12 Mar
Manchester	19 Mar
Birmingham	26 Mar

£150 + VAT CLT Members/£450 + VAT Non-members

## Certificate in Will Drafting

Foundation | 5 hours CPD

This course is aimed at those with little or no experience of will drafting. By the end of the course the delegate will feel confident in drafting not only simple, but also more complex wills and their ensuing due execution. In particular it will deal with:

- Capacity and intention to make a will, and how to resolve problems
- Appointment of executors
- Appointment of guardians
- Types of legacy and problems in drafting including: lapse, ademption and abatement
- Particular assets including - Business assets - Advantages, problems and pitfalls, the matrimonial home - How to protect the surviving spouse's rights of occupation
- Drafting residuary gifts: how to avoid a partial intestacy
- Trusts: types, uses and taxation
- Trustees powers in the light of the Trustee Act 2000: are express powers still necessary?
- Formalities and solicitor's duty in relation to execution
- Tax efficient will drafting
- Some common howlers

Speaker: **Martyn Packer** BA (Hons), LLM, Solicitor, who worked in private practice as a probate and trusts lawyer. He is now a freelance training consultant in the fields of probate, will drafting and private client work.

“Excellent, clear and laced with good diagrams”

Leeds	22 Apr
Birmingham	27 Apr
London	29 Apr

£210 + VAT CLT Members/£465 + VAT Non-members

## Private Client Conversion Course

Intermediate | 27 hours CPD

This course is designed to bring delegates up to a basic level of competence in private client work.

It is suitable for practitioners in any field wishing to change specialisms and also for trainees as it assumes no knowledge at the outset. There will be practical exercises and case studies throughout with plenty of opportunity for questions and discussion. Accompanying the course materials will be a resources pack with forms, guidance and other materials.

Due to the introductory nature of the course and fact that only the basics are covered, it may be necessary to attend some of our other courses for more advanced training.

### Day 1: Will Drafting and Basic Tax

Includes a look at the intestacy rules, the structure of a Will and specific clauses, IHT and CGT and variations and disclaimers.

### Day 2: Trusts

Includes principles and essential elements for creating trusts, taxation and drafting lifetime trusts.

### Day 3: Advising Elderly Clients

Includes the Mental Capacity Act 2005, the Code of Conduct, assessing mental capacity, Lasting Power of Attorney forms and nursing care funded by NHS.

### Day 4: Probate and Administration of Estates

Includes, property passing outside the will/intestacy, preparing the IHT205/IHT400, oaths, tax during the administration of estate, finalising IHT and estate accounts.

### Day 5: morning only

Workshop of practical exercises and case studies.

“ *The speakers were excellent, motivating and exceptional!* ”

Speakers: **Caroline Bielanska** is the former Chief Executive of Solicitors for the Elderly, an organisation she helped to found. She now provides consultancy for law firms on an independent basis, sits on the Court of Protection User's Group and sat on the formal Court of Protection Rules committee and **Anthony Miller** is a training consultant specialising in probate and the administration of estates and trusts. He qualified with the Institute of Financial Services (Trustee Diploma) and is a full member of The Society of Trust and Estate Practitioners (STEP). He has obtained the Diploma in Training Practice with the Institute of Personnel and Development. Anthony is a tutor and author for the STEP Administration of Estates paper and speaks on a number of other legal courses and **Martyn Packer** BA (Hons), LL.M, Solicitor, who worked in private practice as a probate and trusts lawyer. He is now a freelance training consultant in the fields of probate, will drafting and private client work and **Joe Swift** FCA, FCCA, ATII, TEP, Dip PFS, Consultant with Addleshaw Goddard, which is one of the largest firms of solicitors in England with a private client department and formerly a tax partner at Deloitte. Joe has lectured widely on tax and estate planning to various professional groups and clients.

London

2 - 6 Feb, 8 - 12 Jun

£1,195 + VAT CLT Members/£1,750 + VAT Non-members



# Certificate in Probate and Administration of Estates

Foundation | 12 hours CPD

This is a structured two day course designed for those practitioners wishing to gain a good practical grounding in this field.

It is suitable for trainees and newly qualified solicitors who have had little or no grounding at the academic stage, for those returning after a career break and those wishing to change specialisms. It covers all aspects post-death through to finalisation of the estate.

- Good overview of steps in an administration
- Personal representatives: Different types, their duties and authority and options available
- The initial interview: Who is my client? What is my general duty to my client?
- Taking instructions: information required, immediate practicalities to address
- Setting up the file; initial letters; organising and managing the file
- Obtaining information about the estate and ascertaining beneficial entitlement
- Property passing outside the will or intestacy: 'jointly owned property'
- Is there a 'will'? Is it the last will? Are the clauses valid? Is it admissible to probate?
- Entitlement on intestacy
- Preparing the papers to lead to the grant: Responsibilities of Personal Representatives; Form IHT 400, calculation and payment of IHT, and raising funds to meet IHT liability
- Completion of Oath for common form Grants: Probate, Letters of Administration with the will annexed and Letters of Administration

- Other evidence: affidavits of due execution, plight and condition and identity
- Administering the estate: collecting in assets, paying debts and legacies, settling deceased's tax liability to date of death
- Tax during the administration of estate: PRs liability, payments to beneficiaries during the administration and disposals during administration
- Finalising IHT, corrective accounts and obtaining Clearance Certificate
- Finalising the administration: Estate and Distribution Accounts, Transfer to beneficiary entitled
- Inheritance (Provision for Family and Dependents) Act claims
- Post-mortem tax planning: variations and disclaimers, examples of uses, traps for the unwary and the duty to advise (*Cancer Research vs. Ernest Brown*)

Speaker: **Anthony Miller** is a training consultant specialising in probate and the administration of estates and trusts. He qualified with the Institute of Financial Services (Trustee Diploma) and is a full member of The Society of Trust and Estate Practitioners (STEP). He has obtained the Diploma in Training Practice with the Institute of Personnel and Development. Anthony is a tutor and author for the STEP Administration of Estates paper and speaks on a number of other legal courses.

“ Tutor was very helpful and knowledgeable and answered any question I had ”

London

11 - 12 Mar, 3 - 4 Jun

£495 + VAT CLT Members/£795 + VAT Non-members

# Practical Probate: The Works

Foundation | 6 hours CPD

This course will give a detailed and reassuring overview of the complete process of handling an estate in a cost efficient manner without compromising client service. A winning combination!

- Taking instructions: who is your client and who is not • Ascertaining details of assets for both probate and tax purposes, taking control and identifying type of ownership of the assets and establishing liabilities of the estate • Establishing a client led step by step procedure to confidently handle the estate information received throughout the whole administration of the estate, resulting in an excellent client relationship between you and your client • Establishing the validity of the will/status under intestate succession, and preparing and completing through worked examples the Oath and HMRC accounts (full copies and supporting documentation provided) • Collecting in, transferring the assets, settling debts/liabilities from the correct assets of the estate • Distribution under the Intestacy rules or terms of the will, interim distributions and missing beneficiaries • Finalising the administration, preparation of estate accounts, obtaining client acceptance of your legal fees, tax vouchers and vesting of estate assets.

Speaker: **Linda Pratt** LLB (Hons), TEP retired non-practising solicitor and formerly a principal of her own elderly client practice. Linda is a member of the executive committee of the Law Society's private client section.

**“ By far the best course of my legal career! ”**

London	25 Jan, 10 Mar, 1 Jun
Bristol	3 Jun
Birmingham	5 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

# Contentious Probate and Will Disputes: Developing Your Knowledge

Foundation | 5 hours CPD

Unlike some other litigation, contentious probate and will disputes are increasing year on year. This course is designed for litigators who wish to develop their knowledge in this field and enable them to start to build a practice in an area which is both interesting and challenging in equal measure.

The course will cover both legal and practical issues:

- Different types of claim • Probate and intestacy • Standing searches, caveats, warnings and appearances • Challenging a will • Inheritance Act claims: factors to consider, pre-action steps, the effect of prenuptial agreements, dispositions intended to defeat claims • Cost and case management • When to mediate and when not to? • Costs: usual rules and exceptions, Part 36 offers and conduct of parties.

Speaker: **Richard Land** is a partner with Owen White and Catlin LLP and head of the litigation department dealing with contentious probate and other claims. He has extensive experience in dealing with Inheritance Act claims and possession claims on behalf of executors.

**“ Brilliant course covering everything needed for basic understanding of contentious probate to developing practical understanding and applying to actual scenarios ”**

London	2 Feb
Manchester	4 Feb

£210 + VAT CLT Members/£450 + VAT Non-members

## Contentious Probate: Current Issues and Problem Areas for Practitioners

Intermediate | 5 hours CPD

Contentious probate is an expanding area of practice. This course equips practitioners to advise personal representatives, beneficiaries and potential claimants with confidence and is equally suitable for contentious and non-contentious probate practitioners and civil litigators who seek a greater understanding of the issues involved.

It will include a review of developments and relevant case law over the last five years, a consideration of preparation of cases, and practical obstacles and how to overcome them.

The course will cover:

- The probate jurisdiction of the court
- Issues as to formal validity of wills: testamentary intention and due execution
- Probate claims based upon testamentary incapacity, want of knowledge and approval, undue influence and forgery
- Interest claims
- Evidence
- Practice and procedure in probate claims
- Costs in contentious probate claims.

Speaker: **Luke Harris** is a barrister practising at 3 Stone Buildings. Luke has a wide-ranging commercial chancery practice with a particular emphasis on claims involving chattels and bailment, trusts, contentious probate, the administration of estates, claims under the 1975 Act and property including constructive trusts and proprietary estoppel.

“ A splendid day ”

London 15 May  
Manchester 21 May

£210 + VAT CLT Members/£450 + VAT Non-members

## 1975 Act and Other Claims Against PRs

Intermediate | 5 hours CPD

This course will equip private client practitioners and experienced litigators with a comprehensive but practical understanding of claims under the Inheritance (Provision for Family and Dependents) Act 1975 and other causes of action often deployed to acquire an interest in an estate. It will also cover actions PRs may bring against third parties and the resolution of administration disputes with beneficiaries and an in-depth discussion on costs, concentrating on the special rules and categories used by the courts in estate litigation, with particular emphasis on the various steps that should be taken with a view to protecting the client's position on costs.

Attendance on this course will concentrate on recent interesting cases, which will leave delegates confident that their knowledge is up-to-date.

The course will cover:

- Claims under the Inheritance (Provision for Family and Dependents) Act 1975
- Proprietary estoppel
- Constructive trust claims over land
- Undue influence
- Mutual wills and secret trusts
- Rectification and construction
- Administration actions, disputes over accounts and removal of PRs
- Practice, procedure and costs

Speaker: **Edward Hewitt** is a member of 3 Stone Buildings. He practices in a range of Chancery areas specialising in trusts and estates, both from an advisory and litigious perspective as well as real property and insolvency.

Leeds 21 Apr  
London 23 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

# 17 February 2015

## Central London

Fees: **£415 + VAT CLT Members/ £525 + VAT Non-Members**

Major legislative changes are taking place in 2015, with the abolition of the 55% pensions tax on death set to alter the pensions landscape dramatically. Additionally, changes to trust taxation and the introduction of the Settlement Nil Rate Band (SNRB), also mean a rethink in the advice and planning you will need to give your clients from now on.

Our speakers will guide you through these changes, which they will help to fit into the whole world of life assurance and death benefits and recording them for IHT on death. Make sure you are advising your clients with the most up to date knowledge, following announcements in the 3 December 2014 Autumn Statement and 10 December draft Finance Bill clauses, by attending this highly topical and practical conference.

Suitable for any practitioner engaged in will drafting, estate planning and completing IHT returns, you will leave this conference understanding the mechanics of what to do for your clients now as well as how to plan for the future. The speakers include expert practitioners – both solicitors and financial planners. Delegates attending will gain greater understanding of these complex matters.

### Chair

John Bunker is Head of Private Client Knowledge Management for Thomas Eggar LLP, a role developed after 26 years with the firm specialising in wills, trusts, estate and tax planning. In more recent years he has developed regular training in these areas. He has worked extensively with financial planners and investment managers for mutual clients and has played a leading role in developing relationships with financial planners for the firm.

### Speakers

Steven Appleton is a Partner at Laytons private client practice group. Steven deals with most aspects of private client law, including Wills, Trusts, Tax Planning, Power of Attorney, Court of Protection and Probate. Steven is a full professional member of the Society of Trust and Estate Practitioners (STEP) and specialises in advising family and non-family business owners and senior company executives on their estate planning and succession strategy. He also regularly advises older clients, being a member of Solicitors for the Elderly, and is recommended by both Mencap and Scope for advising those with disabled beneficiaries on their estate planning.

Alan Neal, Partner, MFG Solicitors LLP specialises in finance and tax. Alan is recommended in the Legal 500 and is also dual qualified as a Chartered Tax Adviser. Alan was involved in four high-profile Inheritance Tax cases on APR: Antrobus I, Antrobus II, Williams and Golding. He is a member of STEP and is former Clerk to the General Commissioners for Income Tax Purposes for the Kidderminster Division.

Ian Poysden is Managing Director of IEP Financial. Ian has been an Independent Financial Adviser for 20 years and has become synonymous in Brighton for the many wealthy and well-known clients he looks after. He specialises in investments and corporate business and is responsible for all the acquisitions that the company has made.

David Trenner has worked in financial services for over 35 years. In addition to holding the Advanced Financial Planning Certificate, David has been a senior pensions examiner for the Chartered Insurance Institute and has also worked as a guest lecturer at the Mediterranean Insurance Training Centre in Malta. He joined Intelligent Pensions in 2001 and is well known throughout the industry as he is always prepared to provide expert comment and forthright opinions on pensions developments at conferences and to trade and national press.

## 9.00

### 9.30 Chair's Welcome and Introduction

*John Bunker, Thomas Eggar*

### 9.45 Changes to IHT on Trusts: Following The December Autumn Statement, What Do They Mean in Practice?

| Trusts are hugely important to effective planning with life assurance and death benefits so the tax treatment matters | HMRC's "simplification" of IHT on trusts was revamped as "fairness" | Changes announced on 6 June 2014 will be backdated to then | Have the details on 3 & 10 December answered the uncertainties? | How will the new SNRB work and how can it be used effectively?

*John Bunker, Thomas Eggar*

### 10.30 GO Pensions – A Changed Pension Landscape

Pension Reform | Treatment of Death Benefits | Generational planning | Funding Pensions.

*Ian Poysden, IEP Financial*

### 11.15 Refreshments

### 11.30 Completing IHT 409 and How Effective Planning Can Mitigate IHT On Pensions

Mistakes that solicitors need to avoid making and pension misconceptions | completing IHT409 | Different pension structures and their treatment under the new regime.

*David Trenner, Intelligent Pensions*

### 12.15 Life Assurance products with Death Benefits: Issues on IHT 410 & Deduction of Liabilities

| Important concepts in Life Assurance and life cover to report | Some key points in preparing Form IHT 410 | How to show trusts of life policies | Restrictions on the deduction of liabilities and the IHT 419 form.

*John Bunker, Thomas Eggar*

### 1.00 Lunch

### 2.00 Will Drafting as a Jigsaw: Putting All the Pieces Together

Considers Will drafting under the new IHT regime for calculating periodic and exit charges for trusts | Case-study based analysis of typical clients and how we might approach their estate planning. Examples will include: Life interests, Protective trusts, Discretionary trusts, Bereaved minor trusts, 18-25 trusts | Discussion of the practical and technical implications of the following, in the context of Will drafting: Life Policies, Death in Service Benefits, Pensions.

*Steven Appleton, Laytons*

## helping you deal with the challenges resulting from this year's legislative changes

### 3.00 Estate Planning & Using Trusts for Death Benefits in the new IHT regime

Estate planning –bringing legal, tax and financial planning together | Spousal by-pass trusts & death benefits –in the new IHT regime | Review of life policy and death benefit trusts as part of an overall estate planning strategy.

*John Bunker, Thomas Eggar*

### 3.45 Refreshments

### 4.00 Financial Planning Schemes Where You Can "Have your cake and eat it"

Discounted Gift Schemes | Gift & Loan Trusts | Back to Back Schemes.

*Alan Neal, MFG*

### 4.45 Chair's Concluding Remarks and Questions

## 5.00

# Residential Property: An Intensive Introduction for Qualified Practitioners **Hot Topic**

Foundation | 6 hours CPD

This intensive and practical course is aimed at those qualified practitioners looking to change practice areas (for example, due to legal aid cuts) or for those returning after a career break. No prior knowledge of conveyancing (residential or otherwise) is required! The course will provide a practical overview of residential conveyancing and the pitfalls which may occur on a daily basis in today's market including:

- An overview of the conveyancing transaction
- Identifying your client and the source of funds: why this is your responsibility
- Review of searches available in the market: online or paper based?
- Conveyancing Quality Scheme: what is it all about?
- The Protocol and the new forms
- Key risk areas: CML and your duty to the lenders
- What is SDLT? How does it differ from Stamp Duty?
- Standard Conditions of Sale (5th edition)
- Changes in Land Registry practice: where did office copies go?

The course is supported by clear flowcharts of the residential conveyancing process.

Speaker: **Lorraine Richardson** MA (Cantab), Solicitor, specialises in residential conveyancing and wills and probate in a practice in Suffolk. She is a co-editor of the Law Society publication, *Conveyancing Forms and Procedures*.

London	16 Feb
Birmingham	23 Feb
London	8 Jun
Manchester	15 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

# The Average Money Divorce: The Junior Lawyer's Guide to Success **NEW**

Foundation | 5 hours CPD

The 'average money' case, middle income and modest capital, poses particular challenges to the family lawyer. What counts as 'average' may vary, but the fundamental issue is that there isn't enough money to go around easily. Nevertheless, it is often more junior lawyers who deal with the management of these cases. This workshop takes you through the whole process of dealing with a financial remedy case from the preparation of the Form E, analysis of the 'usual' financial disclosure, through to preparing the negotiation correspondence to settle the case and avoid a final hearing.

What you will learn:

- How to fund the average case post LASPO
- Dispute Resolution options: how and when to use voluntary disclosure, mediation, collaborative law and arbitration
- How to manage the client's expectations from first instruction onwards
- How to apply Section 25 Matrimonial Causes Act criteria
- Analysing financial disclosure
- How to identify and narrow issues prior to the First Directions Appointment
- Instructing experts; property and pension valuations
- Approaches for dealing with pensions and maintenance
- Negotiation handling

This course is designed for:

Lawyers in their first few years of practice | Paralegals | Trainees | Legal Executives

Speaker: **Mena Ruparel** MCI Arb is an experienced family law solicitor and consultant with Shedden Family Law. She is also a trainer and arbitrator, a member of the Chartered Institute of Arbitrators and a Resolution accredited specialist in matrimonial finance advocacy.

Birmingham	11 Mar
London	27 Apr
Manchester	8 May
Newcastle	8 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## Understanding the Taxation of Trusts

Intermediate | 3 hours CPD

This course is aimed at private client practitioners who have only tackled estate administration and accounts and wish to develop their knowledge. It deals with clear and practical explanations of the whole range of taxes: income tax, capital gains tax and inheritance tax.

Topics to be covered include:

- Income tax and capital gains tax - Liabilities of trustees and beneficiaries with a focus on life interest versus discretionary trusts - The treatment of dividend income - The special problems arising from settlor interested trusts - Now that trusts are taxed at 28%, when does the CGT charge arise and can it be avoided? - Actual and deemed gains - The availability of holdover, entrepreneurs' and principal private residence reliefs - The ways in which liability can be minimised or avoided
- Inheritance tax - Entry, periodic and exit charges - Use of pilot trusts and multiple trusts - Planning issues.

Speaker: **Nick Shaw** MA (Cantab), TEP is a consultant with the trust and tax team at Addleshaw Goddard.

**“Fantastic speaker-really impressed, felt it was a valuable investment of my time”**

London	16 Apr pm
Birmingham	23 Apr am

£140 + VAT CLT Members/£300 + VAT Non-members

## Trusts: Drafting to Distribution

Intermediate | 6 hours CPD

This course looks at the practical issues involved in trusts from the outset, when the professional has to advise the client upon the most appropriate form of trust for their needs, through the key drafting aspects of the trust deed, the setting up of the trust, some practical aspects during the course of administration and, finally, completing the distribution to the beneficiaries.

The course includes:

- Features of and tax considerations relating to the main types of trust
- The rules against perpetuities and excessive accumulations
- Administrative provisions
- Powers and duties of trustees
- Administering the trust
- Example calculations of IHT charges in relevant property trusts
- Income Tax pool examples for discretionary trusts
- Appointment and retirement of trustees, appointment and advancement of trust funds, variation of trusts
- Breach of trust
- Trustee liability and overview of litigation
- Termination of the trust

Speaker: **Leon Pickering** has a particular interest in private client work, acting as both sole counsel and being led in very high value cases. He is often brought in to deal with complex financial issues in larger cases. Leon also has a strong advisory and non-contentious practice. He gives seminars on all aspects of private client work including succession, tax and charities and he is one of the co-authors of *Tolley's Inheritance Tax Planning*. Leon is an accredited mediator and a member of the Chancery Bar Association.

London	21 Apr
Leeds	28 Apr
Birmingham	12 May
Manchester	19 May

£210 + VAT CLT Members/£450 + VAT Non-members

# The Older Client: A Masterclass **NEW**



Masterclass | 6 hours CPD

Examining the primary issues of concern for the older client, this course tackles the challenges for the solicitor in advising on powers of attorney and gifts, considering issues relating to cross-generational home-sharing, and appropriate and successful outcomes in Statutory Will applications. The implications of working with clients in the early stages of dementia, or vulnerable due to bereavement or other influences will be explored, with use of case studies and sample precedents. Ample opportunity will be given for questions and discussion, and the course will allow for thorough consideration of the relevant ethics and duties of the solicitor where issues of capacity and undue influence may arise.

### Session 1: Lasting Powers of Attorney

This session looks at successful drafting and common pitfalls, to enable practitioners to review their practice, in the light of recent case law.

- Taking Instructions
- Choice of attorneys
- Issues regarding joint, joint and several and replacement attorneys (*Re Boff* (COP) case 12338771)
- Use of restrictions, conditions and guidance
- Role of Certificate Provider
- Confidentiality & 3rd party involvement
- Duties to the attorney
- Concerns of financial abuse (*The Public Guardian vs. JM* [2014] EWHC B4 (COP))

### Session 2: Statutory Wills

- Initial considerations
- Making the application including the draft will
- Respondent sensitivities (*Re AB* [2013] EWHC B39 (COP))
- Best Interests (*NT vs. FS* (2013) EWHC 684)

### Session 3: Sharing a Home

Hoping for the best, yet planning for the worst.

- Informal arrangements (*JS vs. KB, MP* [2014] EWHC 483 (COP))
- Pooling to purchase
- Paying for the extension

- 'Move in to look after me, and the house will be yours' (*Bradbury vs. Taylor & Burkinshaw* [2012] EWCA Civ 1208)
- The role of the 'family solicitor'
- Drafting challenges
- Tax matters

### Session 4: Gifts

- Minimising the risks
- Anti-avoidance
- Lifetime gifts from settlements (*Re JDS:KGS vs. JDS* [2012] EWHC 302 (COP) and *Re AK* (Gift Application) [2014] EWHC B11 (COP))
- 'De Minimis' (In the Matter of GM (Case number 11843118))

Speaker: **Sheree Green**, member of the Law Society Committee on Mental Health and Disability, is a senior associate solicitor in Anthony Collins Solicitors' personal planning and management team with particular expertise in mental health and mental capacity issues, trusts and probate and administration.

“Excellent course. Speaker so informative and sharing of her own experiences in practice as well as substantial law”

London	11 Feb, 24 Jun
Manchester	13 May
Lincoln	10 Jun

£310 + VAT CLT Members/£495 + VAT Non-members



## The Care Act and Funding Care

**Hot  
Topic**

Intermediate | 5 hours CPD

Reform to social care law and funding contained in the Care Act 2014 will have a significant impact on all people needing care and support, irrespective of whether they have the resources to fund their care.

Advisers will need to know how to access an assessment, work out whether the client is eligible for services, how to fund sustainable care, what happens when resources run low or the client has contributed sufficiently to seek state support and how this all fits in with NHS funded care.

This course looks in detail at these points and the impact of the new legislation on the advice that should be given to clients.

Speaker: **Caroline Bielanska** is former Chief Executive of Solicitors for the Elderly and provides consultancy for law firms on an independent basis. She is a committee member on STEP's Special Interest Group on Mental Capacity and sits on the Court of Protection Users' Group. She works closely with the OPG and assisted in the development of the 2009 Prescribed LPA forms and accompanying guidance, has been involved in the on line digitalisation of OPG services. She sits on the current Court of Protection Rules Review Committee. She is author of a number of publications, including contributor to Heywood and Massey's Court of Protection Practice, The Health and Social Care Handbook (the Law Society) and Elderly People and the Law (Jordans).

**“ A highly professional and knowledgeable presentation ”**

Derby	10 Feb	Swindon	5 Mar
Lincoln	12 Feb	Southampton	10 Mar
Plymouth	13 Feb	London	19 Mar
Norwich	3 Mar	Birmingham	20 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

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**29** January 2015  
Central London

Fees: **£415** + VAT CLT Members/ **£525** + VAT Non-Members

Clients who have suffered injuries resulting in the receipt of damages have often gone through a traumatic and difficult experience before they reach your offices. This may leave them feeling particularly vulnerable and so it is of crucial importance that the personal injury and private client lawyers assisting them have up to date and accurate knowledge to ensure that, at least in financial terms, clients can trust that the best course of action is taken. Many clients state that this can enable them to draw a line under the past and start looking towards the future.

Help is at hand for those practitioners who need some guidance in navigating the many issues that arise when advising clients about the handling of their damages. Join our dedicated experts who will guide you through this process starting with an overview of PI trusts before looking in more depth at the creation and management of the trust, a case law update, a consideration of PI trusts and mean-tested benefits, problem areas, options for damages, future PI costs and what to do if your client is mentally incapable. The day will conclude with a Q & A session and some all-important marketing tips!

This information packed day will see that you return to the office ready to deliver a first class service to your clients.

## *Chair*

Michael Knott, is a partner of Irwin Mitchell LLP and a Director of IMTC and IMTL; He heads the Court of Protection departments in Bristol, Birmingham and Newcastle. He has over 20 years' experience as a lawyer in national and international law firms specialising in all aspects of Private Client Law. His specialism and that of his teams is identifying and dealing with the best possible legal structure within which personal injury and clinical negligence damages can be managed.

## *Speakers*

Joanna Grewer specialises in all aspects of Court of Protection work and is the UK manager for personal injury trusts for Irwin Mitchell. She is the Associate Manager of the Birmingham office. Jo identifies and deals with the best possible legal structure within which personal injury and clinical negligence damages can be managed. – either through the medium of a Court of Protection Deputyship or a Personal Injury Trust. She has particular experience of dealing with complex, high value awards. Jo joined Irwin Mitchell last year having worked in the private client field for over 10 years. She is STEP qualified.

Edward Tomlinson is a Financial Adviser with IM Asset Management. He has a Bachelor of Science in Mathematics from the University of Sheffield, and has been awarded Chartered Financial Planner status, the highest accreditation awarded by the Chartered Insurance Institute. Edward is a member of the advisory team at IM Asset Management and is responsible for formulating client specific financial strategies. Edward is also responsible for providing the Courts with advice on the structure of claimant's settlements and has appeared in Court on behalf of claimants.

Alan Robinson was a Principal of his own firm for over 30 years specialising in elderly client, and is now a Consultant. He has worked in the area of community care since its inception and currently teaches community care law for The Open University. He is also a contributor to Tottle's Older Clients Law Service.

Jim Tindal is a former Solicitor and has now been at the Bar for 12 years. He has developed an expertise in cases of people with serious injuries, illnesses and disabilities. Jim has been practising in PI for 14 years, since initially training as a solicitor in that field. He now practices exclusively for Claimants. He is regularly instructed in brain injury cases. He appeared in an 'old scheme' CICA common law damages hearing relating to a permanently brain injured child claimant valued over £5m involving life-long loss of earnings and care and rehabilitation and the inter-relationship between damages and the availability of local authority care. He has been instructed by a local authority which wishes to intervene in a brain injury case involving a child in care with similar issues, and in another complex brain injury case involving a golfing accident and consequent development of seizures. He has an expertise in Court of Protection cases and his cases have featured issues of capacity, welfare decisions, medical treatment and property and affairs for injured clients

## 9.00

### 9.30 Chair's Welcome and Introduction

Michael Knott, Irwin Mitchell

### 9.40 Personal Injury Trusts – An Overview

Michael Knott, Irwin Mitchell

### 10.20 Practical Points on Creating and Managing the Trust

Taking instructions | Drafting | Banking and investments | On-going considerations.

Joanna Grewer, Irwin Mitchell

### 11.00 Refreshments

### 11.15 Case Law Update

SM and HM Case 2 years on | New cases.

Jim Tindal, St Philips

### 12.00 PI Trusts and Means-Tested Benefits

DWP and local authority benefits, including long term care | 52 Week Rules | What can the trust pay for now?

Alan Robinson, Cross Key Associates

### 12.45 Questions

### 1.15 Lunch

### 2.00 Problem Areas

PI trusts and fatalities cases | PI trusts and professional negligence cases | Awards for past care | Personal injury trusts and awards for future care | Death | Minor trusts.

Joanna Grewer, Irwin Mitchell

### 2.30 The Discount Rate, What It Is, Why it is Being Reviewed and Why That Affects You

What is the discount rate | History of the discount rate | Why is the lord chancellor reviewing the discount rate | What options does the lord chancellor have.

Ed Tomlinson, Irwin Mitchell Asset Management

### 3.00 Refreshments

### 3.15 Future PI Costs

Projecting the costs of managing trusts.

Michael Knott, Irwin Mitchell

## PI Trusts: Creation and Duration

### 4.00 The Mentally Incapable Client

Approaching the Court of Protection | Principles of the Mental Capacity Act 2005 – | Court of Protection v Trust | Using a Trust on restoration.

Joanna Grewer, Irwin Mitchell

### 4.45 Chair's Concluding Remarks and Questions

## 5.00

### Adult Safeguarding: A Practical Guide and Update

Intermediate | 5 hours CPD

Adult safeguarding work in the new Court of Protection centres is booming. This course is suitable as a grounding in the subject and also as a refresher and update for those already practising in it.

The course will cover:

- New Statutory Framework for Safeguarding under the Care Act 2014
- Safeguarding and Personalisation - Making Safeguarding Personal
- Safeguarding Process and Procedure
- Types and patterns of abuse and neglect
- Responding to abuse and neglect – what are the options ?
- Mental capacity and decision making: The Mental Capacity Act 2005
- The role of Court of Protection and Public Guardian
- The role of the Independent Mental Capacity Advocate (IMCA) and the new Independent Advocate under the Care Act 2014
- Introduction to the Deprivation of Liberty Safeguards
- Legal aid and the Court of Protection
- Human Rights Act 1998
- New Duty of Candour
- Recent case law developments

Speaker: **Susan Inker** is a freelance legal and training consultant who formerly worked as a family lawyer in practice. She has developed and delivered training in the legal framework surrounding vulnerable children and adults, mental capacity and domestic violence law.

London	14 Apr
Leeds	14 May
Birmingham	23 Jun

£150 + VAT CLT Members/£450 + VAT Non-members

### Court of Protection and Lasting Powers of Attorney Update 2015

Update | 6 hours CPD

This practical course updates on current issues affecting all lawyers who undertake Court of Protection and LPA work.

The course will cover:

- Behind the scenes at the court and the OPG
- LPA/EPA case law update
- Advising attorneys and deputies on their duties and responsibilities
- Gifts and maintenance
- Investments
- Court of Protection case law update

Speaker: **Caroline Bielanska** is former Chief Executive of Solicitors for the Elderly and provides consultancy for law firms on an independent basis. She is a committee member on STEP's Special Interest Group on Mental Capacity and sits on the Court of Protection Users' Group. She works closely with the OPG and assisted in the development of the 2009 Prescribed LPA forms and accompanying guidance, has been involved in the on line digitalisation of OPG services. She sits on the current Court of Protection Rules Review Committee. She is author of a number of publications, including contributor to Heywood and Massey's *Court of Protection Practice*, *The Health and Social Care Handbook* (the Law Society) and *Elderly People and the Law* (Jordans).

“ Beautifully presented and highly informative seminar, presented by a genuine expert in the field ”

Manchester	10 Apr
London	9 Apr

£150 + VAT CLT Members/£450 + VAT Non-members

## Developing Your Court of Protection Practice

Intermediate | 5 hours CPD

Court of Protection work is on the increase and becoming more complex as more clients become mentally compromised. Many individuals who fail to make LPAs fall within this jurisdiction. This presents a practice development opportunity for private client lawyers who need to offer a service to clients in order to meet the demand for Court of Protection applications.

As well as marketing and practice opportunities, this course includes sample forms and a case law update, and will equip practitioners with the skills to tackle the range of applications with confidence.

Recent Court of Protection statistics show that a large proportion of applications submitted contained errors. This course therefore looks at basic applications as well as wider applications with the intention of reducing the occurrence of such errors in the future.

It will also cover:

- The courts jurisdiction and functions of the Office of Public Guardian
- When to apply to the court for a welfare/financial decision
- The application and procedure for the appointment of a deputy
- The application and procedure for Single Orders
- Sale and purchase of property
- Trustees' applications
- Gifts, settlements and statutory wills
- Making decisions as a deputy
- Making the most of state support
- Getting paid.

Speaker: **Caroline Bielanska** is the former Chief Executive of Solicitors for the Elderly, an organisation she helped to found. She now provides consultancy for law firms on an independent basis, sits on the Court of Protection User's Group and sat on the formal Court of Protection Rules committee.

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London	11 May
Leeds	12 May
Birmingham	14 May

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£210 + VAT CLT Members/£450 + VAT Non-members

## Elderly Client 2015 Update

Intermediate | 5 hours CPD

This course covers recent case law as well as new and pending legislation.

Advice for elderly clients is an area of expertise which is constantly developing. It covers a wide range of subjects including case law, property, LPAs, Court of Protection, care funding (local authority and NHS), social security and professional conduct issues. It will also look ahead to the introduction of the Care Act and the new arrangements for paying for care.

The detailed notes include practical examples, draft clauses, specimen letters and action points. The materials are constantly updated to provide you with a thorough and valuable resource of information.

Speaker: **Sheree Green**, member of the Law Society Committee on Mental Health and Disability, is a senior associate solicitor in Anthony Collins Solicitors' personal planning and management team with particular expertise in mental health and mental capacity issues, trusts and probate and administration.

Or **Alan Robinson**, after being principal of his own firm for over 30 years specialising in elderly client, is now a consultant. He has worked in the area of community care since its inception and currently teaches community care law for the Open University. He is also a contributor to *Tottel's Older Clients Law Service*.

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Leeds	4 Mar,
London	18 Mar, 16 Jun
Birmingham	25 Mar
Bristol	17 Jun

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£150 + VAT CLT Members/£450 + VAT Non-members

# 30 March 2015

## Central London

Fees: £415 + VAT CLT Members/£525 + VAT Non-Members

This highly topical conference is essential for anyone working and advising in the area of care and support.

Our experts will take you through the changes to the legislative framework relating to adult social care including the new duties imposed on local authorities and how this will impact on clients in practice. It covers all you need to know to ensure you are well informed of the significant policy reforms taking place.

### Chair

Caroline Bielanska is former Chief Executive of Solicitors for the Elderly and provides consultancy for law firms on an independent basis. She is a committee member on STEP's Special Interest Group on Mental Capacity and sits on the Court of Protection Users' Group. She works closely with the OPG and assisted in the development of the 2009 Prescribed LPA forms and accompanying guidance, has been involved in the on line digitalisation of OPG services. She sits on the current Court of Protection Rules Review Committee. She is author of a number of publications, including contributor to Heywood and Massey's Court of Protection Practice, The Health and Social Care Handbook (the Law Society) and Elderly People and the Law (Jordans).

### Speakers

Jonathan Auburn is a highly rated junior counsel in the field of adult social care, covering the full range of legal issues, including judicial review challenges, charging issues, mental capacity and deprivation of liberty, mental health aftercare, funding disputes between individuals and authorities, homes and authorities and between agencies, ordinary residence, age disputes and a wide range of other social care matters. He has acted in many of the recent landmark legal cases on adult social care. Jonathan publishes a periodic Newsletter on adult social care, available through his chambers. He is the author of 'Judicial Review: Principles and Procedure' (OUP) and also writes for the White Book. Jonathan is top-ranked junior in Community Care Law in Chambers & Partners which states "He gives very good, practical advice that's easy to understand".

Alex Fox is CEO of Shared Lives Plus, the UK network for small community services, representing Shared Lives and working with Community Catalysts to support social care micro-enterprises. Alex is co-Chair of the Think Local, Act Personal board. He co-led on prevention for the social care White Paper engagement exercise. One of NESTA and The Observer's Britain's New Radicals in 2012, a Research Associate at ResPublica and visiting lecturer at Nottingham University, Alex blogs at <http://alexfoxblog.wordpress.com/> and @AlexSharedLives.

Des Kelly OBE, Executive Director, National Care Forum has been Executive Director of the National Care Forum since 2003. The National Care Forum (NCF) is a membership based organisation established to promote quality care outcomes for people receiving care and support services through the not-for-profit sector. Des represents NCF with the main sector bodies. He was previously Partnerships Director with BUPA Care Homes. Des was awarded an OBE in the Queen's Birthday Honours in June 2007 for services to social care. He held the honorary position of President of the Social Care Association 2007-08.

Deborah Klee is the Independent Chair of Sutton and Southwark SABs. In addition to this she has a varied portfolio of work including a health and social care management consultant, Editor of Working with Older People and Co-director of Vintage Communities CiC. As an independent consultant Deborah project managed the LGA, ADASS and SCIE initiative Making Safeguarding Personal and wrote the resulting report Making Safeguarding Personal (LGA March 2013). Deborah has held senior roles at the Audit Commission and Healthcare Commission. Prior to this she worked for 20 years in the NHS as an occupational therapist and executive manager.

# 9.00

## 9.30 Chair's Welcome and Introduction

Caroline Bielanska

## 9.45 Access to State Funded Care

Assessment for adults, and for carers | National minimum threshold for eligible needs | The decision-making process | Care plans.

Caroline Bielanska

## 10.30 Focusing On The Person

How will the general duty to 'promote well-being' affect clients? | Accessing preventative care and support services | Type of information and advice available | Emphasising outcomes rather than services: what might clients be offered? | What are the ways in which care and support can be arranged? | Extending direct payments to residential care and s117 MHA.

Alex Fox, *Shared Lives Plus*

## 11.30 Refreshments

## 11.45 The Means Test, The Care Cap, and Eligible Needs – How Will This Work?

The impact of new capital limits – who pays what? | Personal budgets | Independent personal budgets and care accounts | Changes to care costs calculations | Deferred payment agreements.

Caroline Bielanska

## 12.45 Questions

## 1.00 Lunch

## 2.00 Portability of Services

Ordinary residence | S117 aftercare services | Eligibility | Equipment and adaptation | process.

Jonathan Auburn, *39 Essex Street Chambers*

## 3.00 Refreshments

## 3.15 Care Markets and Care Providers – What Will The Act Do?

How will local authorities shape the market? | Managing financial failure – what will local authorities' new duties mean for clients? | Information about services from local authorities | Ratings for care homes: what will this mean for providers, residents and families?

Des Kelly, *OBE, Executive Director of the National Care Forum*

## 4.00 Safeguarding Adults

How will the new statutory duties work? | Providing care and support to those at risk of abuse and neglect | Safeguarding Adults Boards – who sits on these? | Defining abuse and neglect | Acting on and sharing information.

Deborah Klee, *Independent Chair of Sutton and Southwark SABs*

*The 'inspirational' Caroline Bielanska and our varied panel of experts join forces to discuss and explore this historic piece of legislation to ensure you can advise your most vulnerable clients with confidence*

## 4.50 Chair's Concluding Remarks and Questions

# 5.00

# Mental Health Review Tribunal Panel Course

Intermediate | 12 hours CPD

This course has been approved by the Law Society to meet the requirements of the Mental Health Review Tribunal Accreditation Scheme and must be attended by any applicant seeking membership of the panel. Some knowledge of mental health law is assumed.

### Day 1

- Review of legislative framework
- The ECHR
- Meaning of 'mental disorder'
- A Guide to Psychiatric Disorders
- Role of the nearest relative
- Compulsory admission to hospital under Part 2 MHA 1983
- Compulsory admission to hospital of mentally disordered offenders under Part 3 MHA 1983
- Admission to hospital and treatment of children
- Treatment of detained patients under Part 4 MHA 1983
- Practical exercise

### Day 2

- Discharge under S23 MHA 1983
- S117 aftercare
- Community Treatment Orders
- Guardianship
- Decision making under the Mental Capacity Act 2005
- The Deprivation of Liberty Safeguards, Schedule A1, MCA 2005
- Mental Health Tribunals-Applications and referrals, rule of procedure, powers under Ss 72 – 75 MHA 1983
- Case preparation
- Tribunal Advocacy
- Ethical and professional conduct issues
- Practical advocacy exercise

Speakers: **Michael Butler** is a Solicitor Advocate and Principal at Butler & Co Solicitors in Taunton, specialising in Criminal and Mental Health Law.

**Dr Helen Thorley** is a trained psychiatrist and psychotherapist and has worked in the NHS for over 35 years, mainly in General adult psychiatry in acute and community settings, in intensive care and in rehabilitation. She is a teacher and trainer of mental health professionals including undergraduate and post graduate doctors in training. She has acted as an examiner for the Royal College of Psychiatrists. Dr Thorley was appointed to the first tier tribunal services in 2007.

**“Informative and helpful”**

Manchester	11 - 12 Jun
Birmingham	18 - 19 Jun

£995 + VAT CLT Members/£495 + VAT Non-members



## Assertiveness Skills

Foundation | 5 hours CPD

This course enables you to improve your assertiveness skills enabling you to ask for what you want and manage expectation using constructive communication skills.

Maybe you face the challenge of having to speak up for your views more in tough situations or with challenging people. Maybe you know that you can become aggressive under pressure. In either case, you know you want to have the power to communicate more effectively and achieve better outcomes.

This is the course for you. Practical and pacy, it will enable you to work out new strategies and improve your impact on people and on situations.

- Shaping events: asking for what you want
- How to say what you mean
- Managing expectations
- Constructive communication principles
- Becoming more assertive: confidence building
- Defusing aggression in self and others
- Building personal credibility
- Assertiveness, power and influence
- Managing conflict assertively
- Use of challenging and probing

Speaker: **Elizabeth McManus** MA, Grad IPD, is a founding partner of Development Alternatives – a professional training and management consultancy – and a former personnel and training manager with Addleshaws.

London 23 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

## Business Development for Lawyers

Foundation | 6 hours CPD

This course will equip lawyers with a range of strategic marketing, tactical business development and selling skills and activities which they should undertake whether working with commercial or private clients.

The course starts by considering the context of changes in the market and strategic firm-wide issues, considers the various traditional and online promotional marketing tools available and progresses onto selling to new clients and developing more business from existing clients and referrers.

### Get ready

• Set goals • Consider your firm and departmental context • Analyse your referrers, clients and work • Discover new client needs and develop new services • Select the right strategy • Develop a niche practice.

### Take action

• Identify targets using research • Raise your profile • Use social media to listen to the market and make connections • Generate enquiries and leads.

### Produce results

• Learn selling skills • Manage client and contact information • Pitch effectively for new clients and work • Convert enquiries into clients • Develop action plans • Monitor progress and results.

Speaker: **Kim Tasso** BA, DipM, MBA, is an independent strategic marketing consultant, specialising in the professional services sector, with over 30 years' experience including a senior business development role at Nabarro Solicitors.

London 24 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

### Developing and Implementing Effective Client Care Practices **NEW**

Intermediate | 6 hours CPD

The course will provide you with an understanding of why client care is essential to running a successful firm.

It also provides a practical framework for setting up and implementing a working client care system, and to develop the skills needed to communicate effectively with clients in order to underpin and develop client relationships.

Topics covered include:

- Why client care is important
- Marketing quality – branding and kite marks
- The PCC core principles and Chapter 1
- Benchmarking service excellence
- Client profiling
- Analysing current client care practice
- Developing a client care plan
- Delivering a quality service – CRM systems, SLAs and other key issues
- Clients as stakeholders
- Communicating with clients – the how and when
- Holding conversations and influencing skills
- Managing expectations
- Dealing with difficult interactions – handling complaints and criticism
- Ensuring win:win outcomes

Speaker: **Martin Richardson** is a lawyer who began his career as a legal academic before moving to the City and the former Berwin Leighton to set up and run the firm's first professional development programme.

London 13 May

£210 + VAT CLT Members/£450 + VAT Non-members

Future dates available **online**

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<b>4</b>	<b>£225</b>	<b>£450</b>
<b>10</b>	<b>£375</b>	<b>£750</b>
<b>20</b>	<b>£599</b>	<b>£1199</b>

*Terms and Conditions apply. All prices exclude VAT*

## Getting the Very Most Out of Your Day

Intermediate | 5 hours CPD

The key to making the most of your time is planning and then protecting your plan. People who say that they have no time do neither plan nor protect.

If you plan what to do and when, and then stick to it, then you will have time. For people who have demands placed on them by others, particularly other departments, managers, and clients, you are obliged to diplomatically manage the expectations of others.

Getting the most from your day is chiefly about conditioning your environment, rather than allowing your environment to condition you. If you tolerate, and accept without question, the interruptions and demands of others then you create your own time management problems.

Objectives:

• To understand a seven stage process for managing your time • To become aware of where your time is being spent • To be aware of where your time should be spent • To take away some key hints and tips for immediate application • Current use of time • Time comparisons • Time wreckers • Prioritising tasks • Improving your efficiency • Delegation • Assertiveness • Review.

Speaker: **John Ranson** has a vast range of experience in management training from many sectors and delivers enjoyable, practical training focused on providing solutions for day to day business issues.

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London 16 Jun

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£210 + VAT CLT Members/£450 + VAT Non-members

## Managing and Motivating People

Intermediate | 6 hours CPD

Designed for staff with responsibilities within a legal environment (or for those about to undertake them), this course provides an overview of the key issues to be understood to manage people well in a rapidly changing environment.

For law firms, people are the most important and most costly investment made. It is therefore vitally important that all 'people managers' understand a range of tactics and methods to ensure that the firm not only maximises its return on the investment, but also creates a culture within which staff are happy and want to play their part in achieving the firm's goals.

This practical and interactive seminar takes the fear out of managing people and explores the following key areas:

• What is different about law firms? • Common goals, values and standards • Motivating people • Leadership and teams • Effective delegation • Coaching and development • Performance management and 'difficult' people • Managing change.

Speaker: **Keith Harper** is Managing Director of Harper Professional, and is a management consultant and trainer who works solely with law firms. He has 15 years' experience of successfully advising and training a wide range of clients from global businesses to small partnerships. From previous senior roles in industry, and the professional services sector, Keith has gained a wealth of experience of management issues, and specifically of the role of management within the legal environment.

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London 19 May  
Manchester 21 May

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£210 + VAT CLT Members/£450 + VAT Non-members

## Live Webinars

Visit [www.clt.co.uk/webinars](http://www.clt.co.uk/webinars) to see our extensive programme.

### Cross Border Administration

Estates with assets in more than one jurisdiction are common and dealing with the administration of these can present difficult problems for both the experienced and inexperienced advisor. This webinar offers both an analysis and some solutions for the issues which arise in administering estates with cross border elements.

Speaker: **James Ward** TEP is a Partner in the Seddons Private Client Department and specialises in succession planning, tax and mental capacity law. James sits on the committee of STEP's Mental Capacity Special Interest Group and is a member of STEP's digital assets taskforce. James regularly gives lectures and articles on various private client subjects, especially in relation to the duties of fiduciaries, either attorneys or legal personal representatives.

27 Jan | 1.00pm - 2.30pm

### Testamentary Capacity- Recent Cases and the Impact of the Mental Capacity Act 2005

Those involved in will writing will (or should!) be familiar with the case of *Banks v Goodfellow*, which lays down the test for capacity to make a will, and with *Kenward v Adams*, which sets out the 'golden rule' to be followed where a testator is elderly or infirm. This must-see webinar examines a number of recent cases which look not only at further development of these principles but also at the interplay between them and the MCA 2005. Cases covered include *Hawes v Burgess*, *Simon v Byford*, *Fischer v Diffley* and *Bray v Pearce*.

Speaker: **Edward Hewitt** is a member of 3 Stone Buildings. He practices in a range of Chancery areas specialising in trusts and estates, both from an advisory and litigious perspective as well as real property and insolvency.

20 Jan | 1.00pm - 2.30pm

### Trusts and Trustees - Remedies for Disgruntled Beneficiaries

Dissatisfied beneficiaries can pose a real challenge to practitioners, whether you're acting for or against them.

This webinar looks at both sides of the dispute: what remedies can disgruntled beneficiaries pursue and how best can trustees protect themselves after *Pitt v Holt*? It will cover; the irreducible core of trustees' duties, discretionary powers, rights of beneficiaries, breach of trust claims, third party claims, protection for trustees, payment into Court under section 63 Trustee Act 1925, trustees' lien over trust estate, limitation defences.

Speaker: **Araba Taylor**, Barrister at Fenner's Chambers in Cambridge.

28 Jan | 1.00pm - 2.30pm

### The Care Act - The Essentials in 1 Hour

You cannot afford to miss this comprehensive 'mini-guide' to the recent reforms to the law relating to care and support for adults and support for carers. Topics covered include, assessments for care and support, eligibility threshold, changes to deferred payments and financial assessment and how the funding cap works.

Speaker: **Caroline Bielanska** (see page 20).

13 Jan | 1.00pm - 2.30pm

A bouquet of pink tulips is visible on the left side of the image, partially obscured by the text overlay.

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Speaker: Caroline Bielanska

## Lasting Powers of Attorney in a Business Context

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Speaker: Lesley King

## The Point of Discharge From Hospital to Home

Speaker: Caroline Bielanska

## Trustees' Powers and Duties

Speaker: Ian Cairns

## Will Instructions and Drafting: How to Avoid Post Death Hassle and Litigation

Speaker: Mary Butler

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## New Capital Allowances Regime: A Source **Best Seller** of PI Claims for Property Lawyers

Update | 3 hours CPD

The Capital Allowance regime has always been challenging! From April 2014, capital allowances are only available to someone buying second-hand commercial property if the past owner “pooled” qualifying expenditure for capital allowances, i.e. notified it to HMRC in a tax return. The new legislation requires a proactive approach by lawyers before exchange as failure to deal with this prior to exchange may mean the owner loses considerable tax relief or suffers a reduction in property value. Retrospective action is not always an option. This half day course provides an overview and includes:

- Basic principles - why, what, who? • Impact on property acquisitions, construction and refurbishment costs, capital contributions to tenants • Value of tax relief- case studies and worked examples • What happens to the claim and HMRC • Transition periods • Legislation change and the impact on lawyers
- Practical implications – ‘pooling Requirement’, ‘Fixed Value Requirement’ and ‘Disposal Value Statement’ • CPSEs!!

No commercial property practitioner can afford to miss it!

Speaker: **Rachel Sanders** is Director, Head of Financial & Economic Consulting at AECOM. She is passionate about capital allowances and asset depreciation acting for a wide range of clients investing in property. The team encompasses a broad range of professional services including fiscal incentives, funder advisory, transaction/P3 advisory, business economics and very shortly a policy and economics capability. She is a chartered surveyor.

London 12 Feb pm, 4 Jun pm

£140 + VAT CLT Members/£300 + VAT Non-members

## Commercial Property: Introduction to **Best Seller** Law and Practice; Day 1

Foundation | 6 hours CPD

This course is the first day of a two day series designed for fee earners with little or no knowledge of commercial property law. The days can be attended separately or as a series. This comprehensive programme aims to provide a firm grounding in the essential law and practice in this field.

Day one of the course will focus on:

- Explaining the jargon
- The big picture
- Explaining the ‘players’ involved in a commercial property matter
- Introduction to basic land law
- A brief overview of leasehold law
- An outline of basic conveyancing procedures
- Sale and purchase of commercial property
- Planning and other statutory requirements

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putman wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

Manchester 9 Mar  
London 11 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

# Commercial Property: Introduction to Law and Practice; Day 2 **Best Seller**

Foundation | 6 hours CPD

This course is the second day of a two day series designed for fee earners with little or no knowledge of commercial property law. The days can be attended separately or as a series. This comprehensive programme aims to provide a firm grounding in the essential law and practice in this field.

Day two of the course will focus on:

- The form and main contents of a typical business lease (by reference to a specimen lease)
- Negotiating a commercial lease - the main points to watch out for
- The Code of Practice for Commercial Leases
- Statutory protection for business tenants - Landlord & Tenant Act 1954
- Assignment of commercial leases
- 'Running' commercial leases
- Variations, rent reviews, underlettings, alterations, repairs etc
- SDLT

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putsman wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

London	12 Mar
Manchester	10 Mar

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# Commercial Leases: 2015 Masterclass

Masterclass | 6 hours CPD

This perennially popular course is updated annually to reflect the changing commercial property market and cover all the major topical areas of commercial leases. The 2015 version of the course provides a very practical and detailed review of those topical areas and is constantly updated to reflect new case-law and legislative and regulatory change.

The course is led by two very experienced trainers, one of whom brings the benefits of property litigation experience to the lease drafting experience of the other. This course has proved extremely popular.

Currently the course covers:

- 1954 Act: changing renewal lease terms; the latest on opposing renewal; holding over – where are we post *Barclays v Erimus*
- SDLT & leases: an update
- Alienation: pre-conditions & s 19(1A), *Tindall Cobham & Alnatt v Newton*
- Tenant break options: rent apportionment and repayment, *M&S v BNP Paribas*; practical advice on form, content & service of break notices
- Rent default: practical options for today's market
- Guarantee issues: Topland and AGAs & GAGAs
- Terminal dilapidations: supersession & how the age of the building can reduce the claim
- Green issues in leases
- Competition post *Martin v Crawley*

Speakers: **Peta Dollar** has more than 25 years' experience in all areas of commercial property transactional work (especially development and project finance), the last 17 years as a Real Estate partner at City of London law firm Dentons. She currently works as a freelance lecturer, trainer and writer, providing public and in-house courses, speaking at conferences and publishing articles in the Estates Gazette and Landlord and Tenant Review on a wide range of property topics. Peta is co-author of two of the leading text books on the Landlord and Tenant Act 1987 and mixed use, site editor for The Property Law website and a member of the property consultation board for Practical Law Company and the Editorial Board of Landlord and Tenant Review and **Sarah Thompson-Copsey** is a former property litigation partner in the firm now known as Dentons, with a wealth of experience in all aspects of resolving (and avoiding) commercial property disputes. She currently works as a freelance legal trainer & author, and speaks frequently on a wide range of topical, property issues to members of the legal, surveying & property professions throughout the country. She also provides independent legal auditing services to law firms. In addition, Sarah is co-author of two of the leading text books on the Landlord and Tenant Act 1987 & mixed use, site editor for The Property Law website and on the property consultation board for Practical Law.

<b>Manchester London</b>	<b>23 Oct 10 Feb, 4 Jun, 28 Oct</b>
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£310 + VAT CLT Members/£495 + VAT Non-members

# An Overview of Commercial property for Non-Lawyers **NEW**

Foundation | 6 hours CPD

This course is designed for property managers, investors, commercial surveyors, estates managers, and non-legally qualified staff. It will also be of interest to paralegals who intend to work in commercial property.

The course will give a jargon-free and understandable introduction to the key concepts and issues involved in buying, selling, leasing, or developing commercial property:

- Jargon buster - what are the key words and phrases you need to know
- Big Picture – the role of the various property professionals
- Process of buying freehold property demystified
- Basic Land law guide including - easements - rights - covenants – what are restrictive covenants? - role of the Land Registry
- Mortgages and Facility agreements
- Property Development, Options, Site Promotion Agreements and Conditional Contracts
- Overage - are you feeling lucky?
- The difficulties of making sure you get your overage
- Ransom strips, rights of light, and other nightmares
- Commercial Leases - key points to watch out for on leases including: - Repairing obligations - Restrictions in the lease on use, alterations and sales or underlettings - Service charges - What land is included in the lease? - Break clauses - Guarantors and rent deposits
- Security of Tenure for commercial/business leases - rights to a new lease/when can the landlord refuse?
- Stamp Duty Land Tax - why you have to treat it with as much care as your Income Tax or VAT return.

In addition to the course notes there will be a series of checklists, flowcharts and “main problem areas” sheets.

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putsmans wlc and an associate at Pinsents - specialising in property development, development finance and environmental law.

---

London      23 Apr

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£210 + VAT CLT Members/£450 + VAT Non-members

# Leases and Tenancy Obligations: Exit Strategies

Intermediate | 3 hours CPD

In today's fast changing property market, it is important that both landlords and tenants are aware of the ways in which they can bring both leases and lease obligations to an end.

Using case studies, this practical course looks at the main areas of law and practice surrounding the ending of leases and its effect on both landlord and tenant covenants.

The course will cover:

- Surrender - Effecting, and avoiding accepting, surrender - The practical steps to take
- Break clauses - Reviewing the impact of recent cases on defects in the exercise of break rights - The tricky problem of 'material compliance' - The impact of landlords' break notices
- Forfeiture - Why it might be worth it, even in a falling market - Practical tips to ensure effective operation of the right to forfeit - The problem of tenant insolvency
- Business tenancies - Steps the tenant can take - Section 27 notices or simple vacation? - Practical tips for landlords - Ending the lease after proceedings have started
- Disclaimer - The tricky problem of sub-tenants' obligations
- Notices to quit - How to use them and when
- The release of landlords' and tenants' obligations since the 1995 Act - A review of recent cases

Speaker: **Sarah Thompson-Copsey** (see page 9).

---

London      24 Feb pm, 3 Jun pm

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£140 + VAT CLT Members/£300 + VAT Non-members

## Business Lease Renewal in 2015

Update | 3 hours CPD

The course will focus on negotiating the terms of the new lease, the powers of the court in granting a new lease, and issues of compensation under the LTA 1954 Act and the LTA 1927. The course will concentrate on the three situations where a transactional property lawyer encounters lease renewal issues:

- Steps to take when acting for a tenant who wants to renew – when to serve Form 26 Notice, the content of the notice and the procedure before and after issue of proceedings
- Steps to be taken when acting for the landlord seeking possession under Ground B persistent delay in paying rent.
- Steps to take when acting for the landlord seeking possession under Ground F demolition and reconstruction exploring what should be contained in the Section 25 Notice, excluded works, and the requirement for possession

Speaker: **Ian Quayle** qualified as a solicitor and worked in private practice for 12 years specialising in property law matters. Since 1998 he has worked as a consultant in all aspects of property, landlord and tenant law.

---

London      25 Feb am

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## Pop-ups and Other Short-term Lettings

Advanced | 3 hours CPD

Commercial leases have moved a long way from the old concept of the 'institutionally acceptable lease'. Shorter terms, tenants' demands for greater flexibility and market pressure for rent payment dates that meet tenants' cash flow pressures require a radically different drafting approach.

However, commercial landlords must still comply with their own bank covenants which have not kept pace with changes in the letting market. This creates a major drafting challenge for landlords and their lawyers.

Using three practical case studies, this course focuses on:

- Early access and break strategies
- Variable and inclusive rents
- Creating flexibility without giving security of tenure
- Service charge and insurance issues

This course also provides a clause by clause analysis of pop-up leases. The outcome is a precedent lease that can be taken back to the office and incorporated into the firm's precedent bank.

Speaker: **Malcolm Dowden** is a consultant to City law firm Charles Russell LLP and director of Gwentian Consulting Limited. He has extensive experience of designing and delivering CPD accredited training for law firms and corporate clients. He frequently contributes to journals, including the Estates Gazette and New Law Journal.

---

London      29 Jun pm

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### Rent Collection and Payment - The Hidden Issues **NEW**

Intermediate | 3 hours CPD

Payment of rent is not only the key aspect of the landlord and tenant relationship, it's the very foundation of it. But how well is the nature of rent understood? Anyone can send out a rent demand, anyone can make a rent payment, but not everyone is aware of the potential to lose valuable rights and remedies, or even to incur penalties, if actions are taken without the relevant knowledge. In this course, we consider rent collection and payment from the position of both landlord and tenant, dealing with the wider consequences for other lease rights and obligations, the management of the landlord and tenant relationship, and prevention of problems before they occur.

• Assessing different types of tenant and landlord • When rent is due • When to pay • Risks of late payment • Apportionment • The rules of appropriation • Waiver of the right to forfeit • CRAR and other remedies • Implications of payment by third parties • Payment and acceptance in holding-over situations.

The course is focused on commercial property, while also considering specific issues in relation to mixed-use properties with a residential element. It is aimed at all property litigators and commercial property lawyers.

Speaker: **Mark Shelton** is a professional support lawyer with Eversheds LLP. He qualified with Linklaters and has always specialised in property litigation. Mark was a partner at Lawrence Graham, and has acted for major property investors, financial institutions and leading retailers. He is a contributor to Estates Gazette and Property Law Journal.

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<b>Birmingham</b>	<b>15 May pm</b>
<b>London</b>	<b>22 May pm</b>

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### Hot Topic

### Rent Review Clauses - Back with a Vengeance

Intermediate | 3 hours CPD

As market conditions improve landlords are seizing opportunities to review rents! Therefore it is essential that you are fully alive to the issues in rent review clauses which have the potential to enhance or damage the value of a commercial property investment: whether you are negotiating a new rent review clause, considering amendments to provisions in a 1954 Act renewal lease or operating an existing review. This half day course combines an overview of rent review provisions with practical exercises and case studies designed to develop and test your understanding.

- Rent review and the "presumption in favour of reality"
- Notices, counter-notice and "time of the essence"
- Effect of break clause?
- Defining the hypothetical lease: what is the appropriate term, demise, lettable unit and use?
- Assumptions and disregards: will your tenant be able to argue for a discount or nil-uplift?
- What does "headline rent" mean? how do you achieve it?
- Rent reviews on lease renewal: is there still a place for the "penultimate day" review?
- Expert or arbitrator? Challenging third party determinations.

With clients looking for their lawyers to add value can you afford to miss this course? It is relevant to all commercial property lawyers whether you act for tenant or landlord

Speaker: **Malcom Dowden** is a consultant to City law firm Charles Russell LLP and director of Gwentian Consulting Limited. He has extensive experience of designing and delivering CPD accredited training for law firms and corporate clients. He frequently contributes to journals, including the Estates Gazette and New Law Journal.

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<b>London</b>	<b>30 Jun pm</b>
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## Service Charges and Insurance in a Commercial Lease - is 100% Recovery ever Possible?

Intermediate | 3 hours CPD

In today's difficult market, service charge and insurance clauses remain crucial, allowing the landlord to recover from tenants the costs of running a building, retail centre or business park. As market conditions have driven reduced lease terms, the court has become far more willing to interpret service charge and insurance provisions in favour of tenants.

This half day course is aimed at all commercial property practitioners who advise on or draft commercial leases. It examines recent case law on service charge and insurance, together with industry initiatives such as the service charge code, and provides a comprehensive toolkit for landlords and tenants.

Speaker: **Malcolm Dowden** is a consultant to City law firm Charles Russell LLP and director of Gwentian Consulting Limited. He has extensive experience of designing and delivering CPD accredited training for law firms and corporate clients. He frequently contributes to journals, including the Estates Gazette and New Law Journal.

London 30 Jun am

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<b>4</b>	<b>£225</b>	<b>£450</b>
<b>10</b>	<b>£375</b>	<b>£750</b>
<b>20</b>	<b>£599</b>	<b>£1199</b>

*Terms and Conditions apply. All prices exclude VAT*

# Property Contracts: What to do When Things go Wrong

Intermediate | 3 hours CPD

The vast majority of property transactions progress from exchange to completion relatively smoothly, and title passes unhindered from seller to buyer.

However, in today's property market many buyers – whether purchasing freehold or leasehold interests – are looking to withdraw from the property transactions given the fall in property and rental values.

This course looks at the practical steps to be taken when things go wrong, both pre-and post-completion, and will cover:

- Failure to complete - Compensation - Drafting and serving the notice to complete - The perils of amending the standard conditions - The role of specific performance in today's market • Bringing the contract to an end - Triggering the right to 'rescind' (failure to complete, landlord's consent) - The problem of delay - What is meant by repudiatory breach - and how hard is it to prove?
- Misrepresentation - What type of 'statement' - Proving inducement or reliance - The availability of rescission and assessing damages - Avoiding liability: do disclaimer, 'non-reliance' and whole agreement clauses work? • Errors in the document - The court's approach to construction - The role of pre-contractual negotiations - Unilateral or mutual mistake - The evidence needed

Speaker: **Sarah Thompson-Copsey** (see page 9).

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London      24 Feb am, 3 Jun am

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£140 + VAT CLT Members/£300 + VAT Non-members

## Commercial Property Update 2015

**Best  
Seller**

Update | 5 hours CPD

This key course has earned its well deserved reputation for being an absolute 'must' for busy practitioners to keep up-to-date.

It covers a huge range of recent and pending commercial property law and practice changes. It provides an analysis of the legal developments and always considers these in the light of the practical implications for day to day practice.

[Content is subject to change from time to time, in order to ensure that the most important recent developments are included.]

Topics will include:

- Flood insurance: *Flood Re* • Beach - Registration as a Town and Village Green?
- Registered Charges and Facility Agreements • Easement by Estoppel • Extent of Solicitors' Liability in Redeeming Charges • Guarantor's Obligation to Take New Lease on Insolvency

Speaker: **Natasha Dunn** (see right).

Or **Professor Peter Reekie** (see page 18).

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Leeds	5 Feb
London	11 Feb
Birmingham	12 Feb
Newcastle	18 Feb

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£210 + VAT CLT Members/£450 + VAT Non-members

## Corporate Support in a Day

Intermediate | 5 hours CPD

When asked to assist with the property aspects of corporate transactions, property lawyers need to be prepared and ready for the task. This often means working in a very different way and adopting a totally different approach.

This five hour practical course aims to provide both an overview and understanding of what the job might entail and will include:

- How corporate lawyers work - understanding how this differs from what property lawyers are used to
- An overview of corporate support and explanation of how the various elements fit together
- The differences between a share purchase and an asset purchase and the practical implications for the property lawyer
- Separation of 'Property' from other 'Assets' and other issues
- The practical exercise of negotiating warranties and disclosures and undertaking due diligence
- The CLLS Certificate of Title - an overview and understanding of how to complete it

Practical scenarios will be used throughout the day to highlight various issues.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

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London      19 Mar

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£210 + VAT CLT Members/£450 + VAT Non-members

## Commercial Leases for Local Authorities: Differences and Pitfalls **NEW**

Update | 5 hours CPD

Management of local authority property portfolios creates unique problems and property lawyers are frequently facing specific problems given the nature of local authority work.

The course is aimed at all local authority lawyers or for those who act for authorities from time to time. It sets out a useful overview for the less experienced lawyers and is a useful update for more experienced practitioners. It includes:

- Mixed use schemes: service charge issues and common parts problems
- Drafting issues relevant to local authorities
- Regulating occupation: avoiding statutory protection and estoppel
- Start Up Schemes and Tenant Friendly Leases
- Green Issues
- Management issues including regearing
- Recent case law and case studies

Speaker: **Ian Quayle** qualified as a solicitor and worked in private practice for 12 years specialising in property law matters. Since 1998 he has worked as a consultant in all aspects of property, landlord and tenant law.

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Leeds      12 May  
London      19 May

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£210 + VAT CLT Members/£450 + VAT Non-members

# 16

### Introduction to Agreements for Lease: The Basics **NEW**

Foundation | 3 hours CPD

This half day foundation course is aimed at consolidating and expanding your understanding of agreements for lease of commercial property.

This course will provide a practical guide for dealing with a standard basic agreement for lease including:

- When and why do you need an agreement for lease?
- Simple conditionality
- Complying with s2 Law of Property (Miscellaneous Provisions) Act 1989
- Enforcement.

Using a precedent form of agreement for lease and providing ample opportunity to ask questions of the well known and experienced speakers this course will provide a useful introduction to newly qualified practitioners or those transferring their skills from another area of law. It will also provide an update and refresher for the more experience practitioner.

For those looking for a more advanced course please refer to "Agreements for Lease and Development: The Next Episode".

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

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London      3 Mar am, 22 Sep am

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£140 + VAT CLT Members/£300 + VAT Non-members

### Agreements for Lease and Development: The Next Episode **NEW**

Intermediate | 3 hours CPD

This half day advanced course will demystify the issues in agreements for lease incorporating development issues including:

- Conditions- the importance of precise drafting: what amounts to "satisfaction"? why do you need long stop dates? • Tax Issues - SDLT, VAT and CIS • Practical completion - should you define it? • Issues with tenant itting out works. • Why do I need to see the building contract ? • Overview of construction terms and related documents- deeds of appointment, collateral warranties/Contracts (Rights of Third Parties) Act 1999.

This course is aimed at those wishing to build on a good working knowledge of basic agreement for lease issues and provide a wider field of expertise to clients and will also serve as an update and refresher for the more experienced practitioner.

This course provides up to date practical knowledge and the opportunity to ask questions of the experienced speakers

For those wishing to consolidate their knowledge of basic agreement for lease issues please refer to "Introduction to Agreements for Lease: The Basics"

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

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London      3 Mar pm, 22 Sep pm

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£140 + VAT CLT Members/£300 + VAT Non-members



## Introduction to Leases - The Basics **NEW**

Foundation | 6 hours CPD

This foundation course, jointly run by two highly experienced speakers, is aimed at expanding and consolidating your understanding of leases of commercial property.

The course will not only give you an understanding of the basic terms in a lease of whole but will also look at what you should consider when drafting a lease of part. The speakers will explain the need for and issues with ancillary documents including licences for alterations and alienation and deeds of variation. It is a practical course aimed at all qualified practitioners whether newly qualified or transferring to commercial leases from another area of law. It will also serve as a useful refresher for those who do not deal with leases on a daily basis.

Topics covered include:

- What is the demise? • Rights/exceptions • An introduction to open market rent review and turnover rents • Guarantees and AGAs • Landlord's consent on alienation • Landlord and Tenant Act 1954 framework and contracting out • Quiet enjoyment • Repair • Alterations • User

This is very much a practical course using precedent clauses and giving you every opportunity to ask questions.

For those practitioners wishing to build on this course or needing to drill further into more complicated leases please see our course "Advanced Leases"

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

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**London**      **4 Mar, 24 Sep**

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£210 + VAT CLT Members/£450 + VAT Non-members

## Advanced Leases **NEW**

Intermediate | 6 hours CPD

This full day course, jointly run by two experienced speakers, drills down into the more complicated and topical issues relating to commercial leases using precedent lease clauses. It will take delegates through a wide variety of topics including:

- Turnover rents • *Allnatt v Newton* clauses, pre-conditions, s19(1A) and Tindall Cobham • Tenant break clauses, drafting issues • SDLT and VAT issues • Assumptions and disregards in open market rent review • Expert/arbitrator determination • Anchor tenants, competition and keep open covenants • Service charges and insurance • Drafting for default, *Jervis v Harris* clauses, insolvency, costs • Yield up obligations - reinstatement, f and f and chattells.

There will be ample opportunity to ask questions.

This course is aimed at commercial property practitioners with a good basic knowledge of basic lease and landlord and tenant issues who are looking to expand on this expertise and thus their client base. It will serve as a refresher and update for those who regularly advise on more complicated leases.

This course also builds on "Introduction to Leases: The Basics".

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

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**London**      **10 Mar, 21 Oct**

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£210 + VAT CLT Members/£450 + VAT Non-members

# 18

Whatever the state of the property market, buyers will seek to exploit any opportunity to reduce their offer and title imperfections will be used in negotiations. The result is that every practitioner must be fully up-to-date with law and practice, with the high number of negligence claims against property lawyers an area of increasing concern.

Add to this the difficulties in the current PI market and you have a real need to reduce your claims record.

Although for reasons of commercial confidentiality, statistics are no longer produced by individual PI insurers, historical data reveals that previously 80% of claims related to the following five areas:

Enquiries and searches

- Completion and registration
- Title problems
- Contract/lease
- Ownership terms

In addition, there are money laundering issues and property-related fraud... What more can you do in a market which is highly competitive on fees? Is there an answer?

CLT has devised a series of courses that address all these issues for all residential and commercial practitioners – however long you may have been in practice.

## Six for Success: Acquisitions and Sales **NEW**

Update - 3 hours CPD

This course outlines some of the current key traps and pitfalls involved in the process of buying and selling residential and commercial freehold properties providing drafting tips, practical guidance and will include worked examples.

It will be relevant for all residential and commercial property practitioners.

The course will give practical guidance and update on the above including:

- What are covenants?
- Enforcement: approach of the courts
- Role of the Upper Chamber (Lands Tribunal)
- Can you protect overage by restrictive covenants?
- In restrictive covenants what is the effect of the death of the covenantee?
- Insurance including the CML requirements

Speaker: **Professor Peter Reekie**, Property Training Consultant with Penningtons Manches LLP and also Visiting Professor at the University of Law.

<b>London</b>	<b>2 Jun am</b>
<b>Birmingham</b>	<b>10 Jun am</b>

Fees: £140 + VAT: CLT Members  
£300 + VAT: Non-members

## Six for Success: Covenants; Current Law and Practice

Update - 5 hours CPD

There have been many recent developments both in statute and in case law in relation to covenants. This course includes consideration of the rules on interpretation of covenants and drafting tips. We also cover the position on the Law Commission's proposals for wholesale change to this area of the law?

Speaker: **Professor Peter Reekie** (see left).

<b>London</b>	<b>17 Jun</b>	<b>Birmingham</b>	<b>18 Jun</b>
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Fees: £210 + VAT: CLT Members  
£450 + VAT: Non-members

## Six for Success: Easements; Where Are We Now?

Update - 5 hours CPD

Existing easements on the title are a headache for any practitioner and his client but especially on developments—large and small! The law relating to easements is almost entirely common law based and therefore is constantly changing. With the current state of the law how sure are you that your advice is up to date? The same Law Commission proposals for covenants also deal with easements. This course includes:

The standard conditions • Parking rights • New case law on easements • Land registry law and practice • Injunctions.

Speaker: **Professor Peter Reekie** (see left).

<b>London</b>	<b>9 Jun</b>	<b>Birmingham</b>	<b>24 Jun</b>
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Fees: £210 + VAT: CLT Members  
£450 + VAT: Non-members

## Six for Success: Property Transactions - Key Concerns **NEW**

Update - **3** hours CPD

This course outlines some of the hot topics relating to risk on property transactions, whilst at the same time giving practical guidance and current thinking on best practice including:

- Property fraud- how safe is your website? And who is the other side?
- Negligence – high risk areas
- Analysis of recent case law
- Practice developments and limiting risk exposure
- Land registration risks.

Speaker: **Professor Peter Reekie**, Property Training Consultant with Penningtons Manches LLP and also Visiting Professor at the University of Law.

<b>London</b>	<b>2 Jun pm</b>
<b>Birmingham</b>	<b>10 Jun pm</b>

Fees: £140 + VAT: CLT Members  
£300 + VAT: Non-members

## Six for Success: Residential Leasehold Transactions **NEW**

Intermediate - **6** hours CPD

This course looks at leasehold conveyancing and will equip you with greater confidence and ensure you are able to deal with residential leasehold transactions with full confidence.

Topics covered include:

- Typical leases: houses and flats
- Issues arising on assignment
- Lenders' requirements
- Management issues
- Recognising defects
- Insurance solutions
- Enfranchisement: practice and procedure
- Extending residential leases
- SDLT: in unusual situations

Speaker: **Ian Quayle** qualified as a solicitor and worked in private practice for 12 years specialising in property law matters. Since 1998 he has worked as a consultant in all aspects of property, landlord and tenant law.

<b>Birmingham</b>	<b>13 May</b>
<b>London</b>	<b>20 May</b>

Fees: £210 + VAT: CLT Members  
£450 + VAT: Non-members

## Six for Success: Commercial Lease Update 2015 **NEW**

Intermediate - **6** hours CPD

For the busy practitioner, this course brings together all the latest case law and statutory/legislative change that has a practical impact on everyday commercial landlord and tenant transactions & disputes.

This course is a practical and time efficient way to stay abreast of latest changes that affect you and your landlord/tenant clients.

Currently the course covers:

- Alienation: Tindall Cobham & problematic pre-conditions; the new consent Protocol – will it work?
- Major issues on leases in mixed-use buildings
- Competition & user clause: *Martin v Crawley* – a storm in a teacup? • SDLT & VAT update • Empty business rates: including the 'problem' with charitable lettings • Defining fixtures, fittings & chattels: Peel Land • Tenant break options: top tips on drafting & exercising • Statutory & legislative update • Opposing renewal under the 1954 Act – changes in the market or the attitude of the court? • 'Holding over' – what now post *Barclays v Erimus* • Alterations: lessons from Topland • Insolvency – hope for landlords post Game Group? • Terminal dilapidations: • Update on important issues when buying and selling property subject to leases: *CPC v Singh*

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

<b>London</b>	<b>22 Jun, 26 Oct</b>
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Fees: £210 + VAT: CLT Members  
£450 + VAT: Non-members



# Mixed Use and Residential Tenants' Rights

**Hot  
Topic**

Intermediate | 6 hours CPD

This course, jointly presented by the co-authors of the leading textbook on the subject, deals with the problems that affect mixed commercial and residential buildings.

Mixed use developments and buildings are hugely popular. However they are subject to statutory residential tenants' rights which may impact on the landlord's ability to dispose of or control the property- even to continue to own it.

This course is aimed at the commercial property practitioner who advises on the purchase, sale, management or development of mixed use buildings. It is also aimed at residential property practitioners who advise on residential multi-let buildings, and at those who advise tenants in mixed use and wholly residential buildings.

The course covers;

- Residential tenants' rights of first refusal under the Landlord and Tenant Act 1987 (as amended)
- Enfranchisement of 'houses' under the Leasehold Reform Act 1967, when does this apply to mixed use buildings?
- Collective enfranchisement under the Leasehold Reform, Housing and Urban Development Act 1993
- Rights to manage under the Commonhold and Leasehold Reform Act 2002
- Residential tenants' service charge rights
- Practical steps for landlords and tenants to avoid common traps and pitfalls, structuring to avoid the impact of the legislation
- Frequently asked questions and problems.

This is a rare opportunity to get to grips with a current hot topic for clients and lawyers alike and ask questions of expert speakers.

Whether you act for landlords or tenants in mixed use or wholly residential properties, you cannot afford to miss this!

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

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**London**      **14 Apr, 1 Oct**

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£210 + VAT CLT Members/£450 + VAT Non-members

# 10 Tricky Commercial Property Problems

Update | 6 hours CPD

This course will look at the top 10 tricky problems which regularly confront commercial property practitioners; with practical guidance offered on the key points to watch out for, best practice and advice for clients.

Topics covered include:

1. SDLT and leases
2. Money laundering issues on property deals
3. Break notices
4. Dealing with tenant insolvency
5. Applications for landlord's consent
6. Overage
7. Dealing with rights to light
8. Land contracts subject to residential leases
9. Using insurance to deal with title problems
10. Dilapidations: proving loss, PLA Dilapidations Protocol

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putman wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

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**Birmingham**      **11 Feb**  
**London**              **12 Feb**

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£210 + VAT CLT Members/£450 + VAT Non-members

## Sales and Purchases of Part - Freeholds and Leaseholds **NEW**

Intermediate | 6 hours CPD

Whether you deal with commercial or residential property, whether it is part of a garden or involves several acres the sale and purchase of part is fraught with traps and difficulties.

What protection is the seller entitled to whilst at the same time making the "part" saleable? Is the seller able to pass on the benefit (and burden) of existing rights and easements and what indemnities should be taken?

You need to be able to understand what use your client intends for his property both now and in the future- whether seller or buyer and what he envisages the other party will be able to do once the title is split.

What happens when the entire property is subject to one lease? Can part be sold and what are the implications for seller, buyer and tenant?

This full day course will deal with the above and other issues including

- boundaries and plans • Land Registry issues • split reversions • existing rights, s62 and Wheeldon v Burrows • granting, excepting and reserving new rights
- imposing new restrictive covenants • passing on (or retaining) benefit of existing restrictive covenants • splitting obligations under s106 planning obligations • CIL (where there is a single planning permission for sold and retained land)

The course is aimed at all property practitioners- whether commercial or residential and will allow delegates ample opportunity to ask questions of these experienced speakers. Precedent clauses and case studies will be used.

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

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**London**      **23 Jun, 27 Oct**

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£210 + VAT CLT Members/£450 + VAT Non-members

## Investment Property Workshop **NEW** **Hot Topic**

Intermediate | 6 hours CPD

Investors in property are looking for a secure income stream and a lawyer who can add value by understanding and identifying the issues which may affect this- as well as those which may affect saleability.

With precedent clauses and up to date guidance the speakers share their extensive experience on the traps and pitfalls which make a difference to an investor. How do you know when a Lease isn't "Institutionally acceptable"- what does that mean? When acting for a seller what can you do to anticipate issues and reduce delays?

Whether you are acting for seller or buyer there are many points on the contract which will make a difference to your client in terms of money and liability going forward. Does it really matter on which basis you apportion the rents? The difference can be significant!

- what is investment property? : buying an income stream- FRI and institutionally acceptable leases • workshop looking at lease issues inc AGAs, tenant break options, user and competition, guarantees, forfeited leases, renewals • issues on contract eg apportionment of rent, service charge, • issues relating to residential and mixed use properties, including residential tenants' immigration position • tax issues, SDLT, VAT, Capital Allowances • issues when buying or selling at auction
- overage • restrictions on letting where the property has a poor EPC rating

This course is aimed at all commercial property practitioners with a good basic knowledge of leases whose clients deal in investment property (anything from a tenanted flat to as shopping centre)

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

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**London**      **9 Jun, 9 Oct**

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£210 + VAT CLT Members/£450 + VAT Non-members

### SDLT Walkthrough and Workshop for Residential and Commercial Conveyancers **NEW**

Foundation | 3 hours CPD

Instead of the traditional presentation this highly practical course will go through the processes of completing SDLT returns online, with demonstrations, including:

- Draft letters to clients at the outset setting out the limitation of your responsibilities and the nature of self assessment with the risks of further tax being imposed
- Questionnaires for clients so you can complete the returns without error
- Flowcharts and decision processes
- Checklists to help you avoid errors
- Draft explanations of key concepts to clients such as linked transactions and connected people, consideration, self-assessment and further tax payment obligations, substantial performance, penalties, overage, deferred consideration, tax savings scheme risks and other issues
- What the common problems are with each tax return and conveyancing situation

Delegates will be encouraged to interact and solve example problem situations involving some of the above issues.

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putman wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

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London      12 May am

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£140 + VAT CLT Members/£300 + VAT Non-members

### SDLT and Commercial Transactions (including Commercial Leases)

**Hot  
Topic**

Advanced | 3 hours CPD

Building on the principles in the morning course we will look at the following areas in the same interactive walk-through manner.

- Linked transactions and connected parties as regards company and commercial property transactions
- Consideration affecting fixtures, goodwill
- Substantial performance and development agreements
- Conditional contracts and options
- Disclosures to HMRC – tricky decision for the client – with suggested draft explanatory notes for clients
- Commercial leases, agreements for lease, substantial performance, premiums, rent deposits, assignments taking effect as grants, renewal of commercial leases, surrenders and regrants, periodic leases, holding over, etc
- Sub sales – the new rules
- Deferred and contingent or uncertain consideration

Delegates will be encouraged to interact and solve example problem situations involving some of the above issues.

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putman wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

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London      12 May pm

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£140 + VAT CLT Members/£300 + VAT Non-members

## Acting for Developers Buying Land

### NEW

**Hot  
Topic**

Intermediate | 6 hours CPD

This course is aimed at all property practitioners (whether commercial or residential) whose clients buy land to develop. The term “developer” includes not only the buyer of several acres but also the purchase of a small plot for one building. Any client buying with the benefit of unimplemented planning permission or looking to apply for planning permission is a “developer”.

Your client is looking to you to help him realise development value so it is important you are aware of the existing title (and other) issues which may impact on value as well as being able to negotiate those which are required for the developed land.

Using worked examples and case studies the speakers will provide up to the minute help and guidance to enable you to recognise the issues which are material to your client and reach completion with a set of documents which properly record the parties’ intentions

This course will include

- Dealing with existing restrictive covenants, easements and other third party rights
- Boundary issues
- Ransom strips, site not directly abutting public highway
- Conditional contracts and options, especially planning issues
- Overage
- S106 and CIL issues
- Stopping up and diverting highways and footpaths
- Site surveys and contamination
- Issues with common land and town and village greens.

It is envisaged that delegates will have a good basic knowledge of property law but may not have had the experience of development work and the issues it raises. It will also serve as a useful refresher for those with development experience.

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9)

London	18 Jun, 22 Oct
Birmingham	16 Oct

£210 + VAT CLT Members/£450 + VAT Non-members

## Land Registry 50 Traps: 2015

Intermediate | 3 hours CPD

This course explores 50 problem areas in land registration and is suitable for both commercial and residential transactional property lawyers. Some of the topics to be covered include:

- Problems and issues with the portal
- The Business Gateway
- Electronic Document Registration Service
- Bankruptcy and IVAs – Land Registry issues
- Administration and administrative receivership
- Prescriptive easements
- Prescribed clauses
- Avoiding property fraud
- Recent Land Registry case law

Speaker: **Ian Quayle** qualified as a solicitor and worked in private practice for 12 years specialising in property law matters. Since 1998 he has worked as a consultant in all aspects of property, landlord and tenant law.

London	25 Feb pm
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£140 + VAT CLT Members/£300 + VAT Non-members

# Boundary Disputes: A Practical Approach

Intermediate | 6 hours CPD

Disputes over boundaries can arise on many transactions, whether a residential purchase or a commercial development. Often the lawyer is asked to advise on the extent of the property on the basis of poor or non-existent plans. This course will identify the key factors determining the position of a boundary and some practical approaches to solving problems. Topics covered include:

- Introduction and context - Neighbour disputes, commercial disputes, ransom issues
- Sources of information on boundaries - HMLR, Ordnance Survey, pre-registration deeds, aerial photos
- Types of dispute - Things going onto adjoining land - Trees, roots, drains, structures - Things interfering with adjoining land - Noise, limitations on light - Breach of legal rights
- Remedies and Limitations - Tort - Nuisance, trespass, negligence - Contractual - Enforcement of covenants and restrictions - Statutory powers - Statutory undertakers powers, local authority powers, Access to Neighbouring Land Act, Party Walls, Land Registry powers - Injunction or damages only

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putsmans wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

London	27 Apr
Birmingham	28 Apr
Leeds	29 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

# Secured Lending for Commercial Property Lawyers

**Hot  
Topic**

Intermediate | 3 hours CPD

Commercial Property Lawyers commonly deal with issues relating to secured lending. Whether acting for lenders or borrowers problems can be encountered in a significant number of areas. When these arise they can be particularly troublesome given that the underlying legal framework can be arcane, and the documentation can be complex. This course will look at current issues and key developments in relation to both law and practice. In this course we include:

- Commercial background: Charges and Debentures
- Priority issues
- Liability to lenders for breach of trust
- New CLLS protocol for discharge
- Companies House requirements
- Mortgages of part
- Key powers of lenders, including the link with facility agreements

The course "Residential Mortgages – Current Key Issues" may be of interest to practitioners who also do residential transactions. There is minimal overlap between the courses.

Speaker: **Professor Peter Reekie**, Property Training Consultant with Penningtons Manches LLP and also Visiting Professor at the University of Law.

London	22 Apr pm
Manchester	28 Apr pm
Birmingham	29 Apr pm

£140 + VAT CLT Members/£300 + VAT Non-members



## An Introduction to Commercial Property Litigation: Part One

**Best  
Seller**

Foundation | 6 hours CPD

This course is aimed at lawyers from a contentious background who are looking to build a practice in commercial property litigation. It will not deal with residential property disputes save in the context of mixed use developments. The course will provide a useful overview of the Landlord and Tenant Act 1954 from which much of the bread and butter work of the commercial property litigator flows, yet contains many traps for the unwary. It will also focus on some of the most common areas in which disputes arise. The course will include:

- The basic concepts of 1954 Act
- Statutory notices under 1954 Act
- Overview of court procedure
- Service charges
- Enforcement of leasehold covenants
- Break options

Speaker: **Mark Shelton** is a professional support lawyer with Eversheds LLP. He qualified with Linklaters and has always specialised in property litigation. Mark was a partner at Lawrence Graham, and has acted for major property investors, financial institutions and leading retailers. He is a contributor to *Estates Gazette* and *Property Law Journal*.

**Manchester** 19 Mar  
**London** 26 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

## An Introduction to Commercial Property Litigation: Part Two

**Best  
Seller**

Foundation | 6 hours CPD

This course builds on An Introduction to Commercial Property Litigation – Part One. The course will not deal with residential property disputes.

It considers procedures where the landlord opposes lease renewal on redevelopment grounds. Dilapidations claims, which are increasingly prevalent, are covered in some depth.

The course will include:

- Tactics and requirements for opposing lease renewal on redevelopment grounds
- The interpretation of repairing covenants
- The conduct and settlement of dilapidations claims
- Obtaining landlord's consents
- How tenants can offload over-rented property
- Trespassers
- Avoiding inadvertent waiver of the right to forfeit and a guide through the variety of relief jurisdictions
- A contrast between distress for rent and Commercial Rent Arrears Recovery

Speaker: **Mark Shelton** is a professional support lawyer with Eversheds LLP. He qualified with Linklaters and has always specialised in property litigation. Mark was a partner at Lawrence Graham, and has acted for major property investors, financial institutions and leading retailers. He is a contributor to *Estates Gazette* and *Property Law Journal*.

**Manchester** 23 Apr  
**London** 30 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

### Small Business Sales: What the Textbooks Don't Tell You

Intermediate | 6 hours CPD

This practical course looks at the wide range of issues which arise in small business sales from structuring the transaction and drafting the documents through to managing the client, tax and employment law.

It also looks at the mechanics of the transaction process, the potential pitfalls, the legal issues and offers some solutions for practitioners.

The course will include:

- Structuring the sale
- Drafting the documents
- Managing the client
- Warranties and disclosures
- VAT and stamp duty issues
- Employees and TUPE
- Dealing with leased assets
- Costing and deal management

Speaker: **Keith Lewington**, MA (Oxon), Solicitor, spent 25 years as a partner in a national law firm. He now practises as part of an innovative virtual law firm, Excello Law Ltd.

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<b>Birmingham</b>	<b>7 May</b>
<b>London</b>	<b>21 May</b>

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£210 + VAT CLT Members/£450 + VAT Non-members

### Fee Structures for a Property Transaction: Is the Hourly Rate Dead?

Intermediate | 3 hours CPD

Managing a real estate team, and pricing your work have never been more challenging especially when pricing structures have to be agreed at such an initial stage; what happens when issues arise which may delay the transaction or impact on irrecoverable WIP?

This course is based on a site which is currently being marketed and takes delegates through the process of scoping the work, deciding on assumptions and exclusions that apply to the pricing structure and drawing up a briefing sheet for the team to ensure that the costs remain within budget.

The course will consider risk management measures and how to capture know-how  
Points covered include:

- review of Heads of Terms • managing client expectations - timelines • pricing - who takes risk? • scope of instructions • managing due diligence • unforeseen title issues - analyse, argue or insure? • covering post-completion costs and delays.

This course is aimed at all experienced commercial property lawyers who may have to deal with fee estimates and quotes. Whilst the course is based on a larger and more complicated transaction, the topics covered and the skills to be learned are relevant to all property transactions.

Speaker: **Malcolm Dowden** is a consultant to City law firm Charles Russell LLP and director of Gwentian Consulting Limited. He has extensive experience of designing and delivering CPD accredited training for law firms and corporate clients. He frequently contributes to journals, including the Estates Gazette and New Law Journal.

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<b>London</b>	<b>10 Jun pm</b>
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# SDLT Walkthrough and Workshop for Residential and Commercial Conveyancers **NEW**

Foundation | 3 hours CPD

Instead of the traditional presentation this highly practical course will go through the processes of completing SDLT returns online, with demonstrations, including:

- Draft letters to clients at the outset setting out the limitation of your responsibilities and the nature of self assessment with the risks of further tax being imposed
- Questionnaires for clients so you can complete the returns without error
- Flowcharts and decision processes
- Checklists to help you avoid errors
- Draft explanations of key concepts to clients such as linked transactions and connected people, consideration, self-assessment and further tax payment obligations, substantial performance, penalties, overage, deferred consideration, tax savings scheme risks and other issues
- What the common problems are with each tax return and conveyancing situation

Delegates will be encouraged to interact and solve example problem situations involving some of the above issues.

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putsmans WLC and an associate at Pinsents specialising in property development, development finance and environmental law.

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London      12 May am

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£140 + VAT CLT Members/£300 + VAT Non-members

# Residential Property: An Intensive Introduction for Qualified Practitioners **Best Seller**

Foundation | 6 hours CPD

This intensive and practical course is aimed at those qualified practitioners looking to change practice areas (for example, due to Legal Aid cuts) or for those returning after a career break. No prior knowledge of conveyancing (residential or otherwise) is required!

The course will provide a practical overview of residential conveyancing and the pitfalls which may occur on a daily basis in today's market including:

- An overview of the conveyancing transaction
- Identifying your client and the source of funds – why this is your responsibility
- Review of searches available in the market – online or paper based?
- Conveyancing Quality Scheme – what is it all about?
- The Protocol and the new forms
- Key risk areas – CML and your duty to the lenders
- What is SDLT? how does it differ from Stamp Duty?
- Standard Conditions of Sale (5th edition)
- Changes in Land Registry practice - where did office copies go?

The course is supported by clear flowcharts of the residential conveyancing process.

Speaker: **Lorraine Richardson** MA (Cantab), Solicitor, specialises in residential conveyancing and wills and probate in a practice in Suffolk. She is a co-editor of the Law Society publication, *Conveyancing Forms and Procedures*.

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London      16 Feb, 8 Jun  
Birmingham      23 Feb  
Manchester      15 Jun

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£210 + VAT CLT Members/£450 + VAT Non-members

## Conveyancing: An Intensive Workshop **Best Seller** for Paralegals and Support Staff

Foundation | 6 hours CPD

This workshop course is designed for paralegal and secretarial staff who work in residential conveyancing. It is a highly practical course offering a greater understanding of the process and how to respond to common enquiries and search results.

It will also assist a busy residential conveyancing team member looking to progress by acting as a useful introduction to conveyancing.

The focus of the day will be on small group work using case studies where you will consider:

- An overview of the conveyancing process and the implications of all key stages
- Where the delegate's own work fits into the conveyancing process
- Investigate a registered title and draft the contract of sale
- Why different searches are carried out and how to respond to the most common search results

Speaker: **Lorraine Richardson**, MA(Cantab), Solicitor, specialising in residential conveyancing in a practice in Suffolk. Lorraine has a wealth of experience, and is also a co-editor of the popular and practical Law Society publication "Conveyancing Forms and Procedures".

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Manchester	19 Jan
London	26 Jan, 18 May
Birmingham	11 May

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£210 + VAT CLT Members/£450 + VAT Non-members

## Conveyancing 2015 Update

Update | 5 hours CPD

Every residential property lawyer must keep fully up-to-date with developments in law and practice.

Carefully developed over the years to be ideal for this purpose, the conveyancing update course is specifically designed to meet the needs of the busy practitioner in an engaging and effective way. In each case the key legal development is set out and the points for practice and drafting are carefully considered.

The topics to be covered are subject to change from time to time to ensure that the most important recent developments are included.

Speaker: **Andrew Crawford** has vast experience having been a practising solicitor and now as a full-time lecturer. Andrew brings the law alive and is always mindful of the need and difficulty of making conveyancing profitable.

Or **Professor Peter Reekie**, Property Training Consultant with Penningtons Manches LLP and also Visiting Professor at the University of Law.

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Birmingham	4 Mar	Bristol	11 Mar
London	5 Mar	Manchester	11 Mar
Leeds	10 Mar	Nottingham	17 Mar
Southampton	10 Mar		

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£210 + VAT CLT Members/£450 + VAT Non-members

### Advanced Residential Property - Small Development Documentation **Hot Topic**

Advanced | 5 hours CPD

Residential property practitioners are increasingly encountering sales of property with development potential as clients maximise the value of their property (whether vacant land or existing buildings). In many cases the client will be new to development and will expect his lawyer to not only draft the documents but advise on the best way of structuring the deal.

This course is designed to help residential conveyancers tackle this kind of work with confidence providing analysis of the legal issues along with drafting and practical points.

Topics covered include:

- Conditional contracts
- Options
- Pre-emption rights
- Overage; problem areas
- Lock out agreements

It will also be useful guidance for commercial property practitioners who have not dealt with this type of property work before.

Speaker: **Professor Peter Reekie**, Property Training Consultant with Penningtons Manches LLP and also Visiting Professor at the University of Law.

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<b>Birmingham</b>	<b>14 Apr</b>
<b>Leeds</b>	<b>15 Apr</b>
<b>London</b>	<b>16 Apr</b>

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£210 + VAT CLT Members/£450 + VAT Non-members

### Acting for a Buyer on a New Build: Pitfalls and Tips **Best Seller**

Intermediate | 3 hours CPD

This course is aimed at the buyer's solicitor who receives a 'mountain' of paperwork from the developer. This is especially true when the property is part of a multi-plot estate. The developer will invariably impose an exchange deadline, the client has paid a reservation deposit and the pressure is on.

Whether it is plot 1 of 2 or 49 of 400, there are points of similarity. This course will provide practical guidance and updates on the documents you are likely to receive and the statutory frameworks applicable to them as well as ways to improve your investigations and reporting given the need for fixed fees in this area.

This course will include:

- S.38, s.104 and s.106 agreements – how is my client affected?
- NHBC and similar schemes – what do I need to do?
- CML requirements – what do I need to report?
- Planning – what is CIL and will it affect my client?
- What do I tell the client?

Speaker: **Lorraine Richardson** MA (Cantab), Solicitor, specialises in residential conveyancing and wills and probate in a practice in Suffolk. She is a co-editor of the Law Society publication, *Conveyancing Forms and Procedures*.

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<b>London</b>	<b>16 Mar am</b>
<b>Birmingham</b>	<b>23 Mar am</b>

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£140 + VAT CLT Members/£300 + VAT Non-members

## Land Registry 50 Traps: 2015

Intermediate | 3 hours CPD

This course explores 50 problem areas in land registration and is suitable for both commercial and residential transactional property lawyers.

Some of the topics to be covered include:

- Problems and issues with the portal
- The Business Gateway
- Electronic Document Registration Service
- Bankruptcy and IVAs – Land Registry issues
- Administration and administrative receivership
- Prescriptive easements
- Prescribed clauses
- Avoiding property fraud
- Recent Land Registry case law

Speaker: **Ian Quayle** qualified as a solicitor and worked in private practice for 12 years specialising in property law matters. Since 1998 he has worked as a consultant in all aspects of property, landlord and tenant law.

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**London**      **25 Feb pm**

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£140 + VAT CLT Members/£300 + VAT Non-members

## Sales and Purchases of Part - Freeholds and Leaseholds **NEW**

Intermediate | 6 hours CPD

Whether you deal with commercial or residential property, whether it is part of a garden or involves several acres the sale and purchase of part is fraught with traps and difficulties.

What protection is the seller entitled to whilst at the same time making the “part” saleable? Is the seller able to pass on the benefit (and burden) of existing rights and easements and what indemnities should be taken?

You need to be able to understand what use your client intends for his property both now and in the future- whether seller or buyer and what he envisages the other party will be able to do once the title is split.

What happens when the entire property is subject to one lease? Can part be sold and what are the implications for seller, buyer and tenant?

This full day course will deal with the above and other issues including

- boundaries and plans • Land Registry issues • split reversions • existing rights, s62 and Wheeldon v Burrows • granting, excepting and reserving new rights
- imposing new restrictive covenants • passing on (or retaining) benefit of existing restrictive covenants • splitting obligations under s106 planning obligations • CIL (where there is a single planning permission for sold and retained land).

The course is aimed at all property practitioners- whether commercial or residential and will allow delegates ample opportunity to ask questions of these experienced speakers. Precedent clauses and case studies will be used.

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

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**London**      **23 Jun, 27 Oct**

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£210 + VAT CLT Members/£450 + VAT Non-members

# Boundary Disputes: A Practical Approach

Intermediate | 6 hours CPD

Disputes over boundaries can arise on many transactions, whether a residential purchase or a commercial development. Often the lawyer is asked to advise on the extent of the property on the basis of poor or non-existent plans.

This course will identify the key factors determining the position of a boundary and some practical approaches to solving problems.

Topics covered include:

- Introduction and context: neighbour disputes, commercial disputes, ransom issues
- Sources of information on boundaries
  - HMLR, Ordnance Survey, pre-registration deeds, aerial photos
- Types of dispute
  - Things going onto adjoining land: trees, roots, drains, structures
  - Things interfering with adjoining land: noise, limitations on light
  - Breach of legal rights
- Remedies and limitations
  - Tort: nuisance, trespass, negligence
  - Contractual: enforcement of covenants and restrictions
  - Statutory powers: statutory undertakers powers, local authority powers, Access to Neighbouring Land Act, Party Walls, Land Registry powers
  - Injunction or damages only

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putsman wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

London	27 Apr
Birmingham	28 Apr
Leeds	29 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

# Mixed Use and Residential Tenants' Rights

Intermediate | 6 hours CPD

This course, jointly presented by the co-authors of the leading textbook on the subject, deals with the problems that affect mixed commercial and residential buildings.

Mixed use developments and buildings are hugely popular. However they are subject to statutory residential tenants' rights which may impact on the landlord's ability to dispose of or control the property- even to continue to own it.

This course is aimed at the commercial property practitioner who advises on the purchase, sale, management or development of mixed use buildings. It is also aimed at residential property practitioners who advise on residential multi-let buildings, and at those who advise tenants in mixed use and wholly residential buildings. The course covers;

- Residential tenants' rights of first refusal under the Landlord and Tenant Act 1987 (as amended)
- Enfranchisement of 'houses' under the Leasehold Reform Act 1967, when does this apply to mixed use buildings?
- Collective enfranchisement under the Leasehold Reform, Housing and Urban Development Act 1993
- Rights to manage under the Commonhold and Leasehold Reform Act 2002
- Residential tenants' service charge rights
- Practical steps for landlords and tenants to avoid common traps and pitfalls, structuring to avoid the impact of the legislation
- Frequently asked questions and problems

This is a rare opportunity to get to grips with a current hot topic for clients and lawyers alike and ask questions of expert speakers.

Whether you act for landlords or tenants in mixed use or wholly residential properties, you cannot afford to miss this!

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

London	14 Apr, 1 Oct
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£210 + VAT CLT Members/£450 + VAT Non-members



## Conveyancing Search and Enquiries - The What and the Why! **NEW**

Update | 3 hours CPD

Conveyancers are increasingly faced with an ever growing list of suggested searches and enquiries on a residential freehold purchase transaction. What is best practice?

This practical half day course will assist conveyancers to identify which searches to carry out and will consider problems which frequently arise on search results and how far you can be expected to deal with them. The course will stand alone or will complement CLT's popular course: 'Residential Property – An Intensive Introduction for Qualified Practitioners'.

The course will cover:

- Which searches should you carry out – an overview
- Common tricky search results
- What further enquiries should you raise when you have received your search results?
- What is an acceptable response to your enquiries?

This course is essential viewing for all residential property lawyers

Speaker: **Lorraine Richardson**, MA(Cantab), Solicitor, specialising in residential conveyancing in a practice in Suffolk. Lorraine has a wealth of experience, and is also a co-editor of the popular and practical Law Society publication "Conveyancing Forms and Procedures".

Birmingham	2 Mar am
London	9 Mar am, 13 Jul am
Manchester	6 Jul am

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Whatever the state of the property market, buyers will seek to exploit any opportunity to reduce their offer and title imperfections will be used in negotiations. The result is that every practitioner must be fully up-to-date with law and practice, with the high number of negligence claims against property lawyers an area of increasing concern.

Add to this the difficulties in the current PI market and you have a real need to reduce your claims record.

Although for reasons of commercial confidentiality, statistics are no longer produced by individual PI insurers, historical data reveals that previously 80% of claims related to the following five areas:

Enquiries and searches

- Completion and registration
- Title problems
- Contract/lease
- Ownership terms

In addition, there are money laundering issues and property-related fraud... What more can you do in a market which is highly competitive on fees? Is there an answer?

CLT has devised a series of courses that address all these issues for all residential and commercial practitioners – however long you may have been in practice.

## Six for Success: Acquisitions and Sales **NEW**

Update - 3 hours CPD

This course outlines some of the current key traps and pitfalls involved in the process of buying and selling residential and commercial freehold properties providing drafting tips, practical guidance and will include worked examples.

It will be relevant for all residential and commercial property practitioners.

The course will give practical guidance and update on the above including:

- What are covenants?
- Enforcement: approach of the courts
- Role of the Upper Chamber (Lands Tribunal)
- Can you protect overage by restrictive covenants?
- In restrictive covenants what is the effect of the death of the covenantee?
- Insurance including the CML requirements

Speaker: **Professor Peter Reekie**, Property Training Consultant with Penningtons Manches LLP and also Visiting Professor at the University of Law.

<b>London</b>	<b>2 Jun am</b>
<b>Birmingham</b>	<b>10 Jun am</b>

Fees: £140 + VAT: CLT Members  
£300 + VAT: Non-members

## Six for Success: Covenants; Current Law and Practice

Update - 5 hours CPD

There have been many recent developments both in statute and in case law in relation to covenants. This course includes consideration of the rules on interpretation of covenants and drafting tips. We also cover the position on the Law Commission's proposals for wholesale change to this area of the law?

Speaker: **Professor Peter Reekie** (see left).

<b>London</b>	<b>17 Jun</b>	<b>Birmingham</b>	<b>18 Jun</b>
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Fees: £210 + VAT: CLT Members  
£450 + VAT: Non-members

## Six for Success: Easements; Where Are We Now?

Update - 5 hours CPD

Existing easements on the title are a headache for any practitioner and his client but especially on developments—large and small! The law relating to easements is almost entirely common law based and therefore is constantly changing. With the current state of the law how sure are you that your advice is up to date? The same Law Commission proposals for covenants also deal with easements. This course includes:

The standard conditions • Parking rights • New case law on easements • Land registry law and practice • Injunctions.

Speaker: **Professor Peter Reekie** (see left).

<b>London</b>	<b>9 Jun</b>	<b>Birmingham</b>	<b>24 Jun</b>
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Fees: £210 + VAT: CLT Members  
£450 + VAT: Non-members

## Six for Success: Property Transactions - Key Concerns **NEW**

Update - **3** hours CPD

This course outlines some of the hot topics relating to risk on property transactions, whilst at the same time giving practical guidance and current thinking on best practice including:

- Property fraud- how safe is your website? And who is the other side?
- Negligence – high risk areas
- Analysis of recent case law
- Practice developments and limiting risk exposure
- Land registration risks.

Speaker: **Professor Peter Reekie**, Property Training Consultant with Penningtons Manches LLP and also Visiting Professor at the University of Law.

<b>London</b>	<b>2 Jun pm</b>
<b>Birmingham</b>	<b>10 Jun pm</b>

Fees: £140 + VAT: CLT Members  
£300 + VAT: Non-members

## Six for Success: Residential Leasehold Transactions **NEW**

Intermediate - **6** hours CPD

This course looks at leasehold conveyancing and will equip you with greater confidence and ensure you are able to deal with residential leasehold transactions with full confidence.

Topics covered include:

- Typical leases: houses and flats
- Issues arising on assignment
- Lenders' requirements
- Management issues
- Recognising defects
- Insurance solutions
- Enfranchisement: practice and procedure
- Extending residential leases
- SDLT: in unusual situations

Speaker: **Ian Quayle** qualified as a solicitor and worked in private practice for 12 years specialising in property law matters. Since 1998 he has worked as a consultant in all aspects of property, landlord and tenant law.

<b>Birmingham</b>	<b>13 May</b>
<b>London</b>	<b>20 May</b>

Fees: £210 + VAT: CLT Members  
£450 + VAT: Non-members

## Six for Success: Commercial Lease Update 2015 **NEW**

Intermediate - **6** hours CPD

For the busy practitioner, this course brings together all the latest case law and statutory/legislative change that has a practical impact on everyday commercial landlord and tenant transactions & disputes.

This course is a practical and time efficient way to stay abreast of latest changes that affect you and your landlord/tenant clients.

Currently the course covers:

- Alienation: Tindall Cobham & problematic pre-conditions; the new consent Protocol – will it work?
- Major issues on leases in mixed-use buildings
- Competition & user clause: *Martin v Crawley* – a storm in a teacup? • SDLT & VAT update • Empty business rates: including the 'problem' with charitable lettings • Defining fixtures, fittings & chattels: Peel Land • Tenant break options: top tips on drafting & exercising • Statutory & legislative update • Opposing renewal under the 1954 Act – changes in the market or the attitude of the court? • 'Holding over' – what now post *Barclays v Erimus* • Alterations: lessons from Topland • Insolvency – hope for landlords post Game Group? • Terminal dilapidations: • Update on important issues when buying and selling property subject to leases: *CPC v Singh*.

Speakers: **Peta Dollar** and **Sarah Thompson-Copsey** (see page 9).

<b>London</b>	<b>22 Jun, 26 Oct</b>
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Fees: £210 + VAT: CLT Members  
£450 + VAT: Non-members



# Shared Ownership Leases: An Introduction

Foundation | 5 hours CPD

Shared ownership is growing in popularity across the UK. It offers an excellent alternative for people on a limited income unable to secure a mortgage large enough to buy a property within their area. Generally such schemes are offered by housing associations or local authorities.

Typically the buyer will be offered between 25% and 75% of the market value of the leasehold interest in the property and will secure a mortgage on that amount. Depending on the scheme they may pay an amount of rent on the portion of the interest they do not purchase.

The schemes offer a wide range of benefits to buyers and often allow the buyer to increase their stake in the property over time ("staircasing"). This can further complicate the SDLT position.

This course provides an introduction to those who are new to this area of law whether acting for buyers or on a mixed use development. It will also serve as a refresher and update for those more experienced practitioners.

Speaker: **Rebecca Cattermole** is a barrister at Tanfield Chambers specialising in property and landlord and tenant (commercial and residential). She has a particular interest in shared ownership leases having represented the landlord in *Catalyst Communities Housing Association v Hart*. Ranked as a leading junior since 2005, Chambers UK 2014 describes her as "bright, thorough and extremely reliable." and **Cecily Crampin** practises all aspects of property law, including residential and commercial landlord and tenant law. Cecily has a doctorate in mathematics. In her practice, she aims to combine the analytical skills she acquired with practicality and friendliness.

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London 14 May

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£210 + VAT CLT Members/£450 + VAT Non-members

# Residential Mortgages - Current Key Issues

Hot Topic

Intermediate | 3 hours CPD

Residential property practitioners deal with mortgages on almost a daily basis. However, it is often only when problems occur that it is discovered just how complex and intricate are the principles of law and practice in this area. And these can arise in many stages of a transaction - perhaps in relation to such things as undertakings, discharges, the Handbook requirements, problems on registration and general duties of care. This course includes:

- Key terms of mortgages
- Lenders' panels, dual representation and related problem areas
- Undertakings to discharge – risk areas
- Protecting the mortgage
- Solicitor's liability to lenders – fraud checks
- CML and BSA Handbooks – selected key points

The course "Secured lending for commercial property lawyers" may also be of interest to practitioners who also do commercial transactions. There is minimal overlap between the courses.

Speaker: **Professor Peter Reekie**, Property Training Consultant with Penningtons Manches LLP and also Visiting Professor at the University of Law.

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London 22 Apr am  
Manchester 28 Apr am  
Birmingham 29 Apr am

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£140 + VAT CLT Members/£300 + VAT Non-members

## Affordable Housing: Acting for the Purchaser

Intermediate | 5 hours CPD

Affordable housing schemes vary greatly in nature and are an important sector of the conveyancing market. There are vital differences between these transactions and 'standard conveyancing' of which all practitioners should be aware.

This course is designed as a practical guide for practitioners acting for individuals buying and selling affordable housing.

The course will cover:

- Introduction to shared ownership
- Shared ownership conveyancing: overview of the model lease (highlighting the revisions introduced in 2010)
- SDLT: on the grant of a lease, Market Value Election
- Shared equity loans: an overview of the current government funded schemes
- Staircasing: what is it?

Speaker: **David Keighley** is a partner and head of residential conveyancing at Herrington & Carmichael, a large Surrey firm. David specialises in shared ownership conveyancing.

London	1 Jun
Leeds	5 Jun

£210 + VAT CLT Members/£450 + VAT Non-members

## Possession of Private Residential Premises

Update | 6 hours CPD

This course deals with possession of residential property under both tenancies and mortgages and in situations where the interest may not be so clearly defined (eg squatters and licensees).

Since 1950s and 1960s when there were many cases involving unscrupulous landlords there has been a complete change in the relationship of landlord and tenant with the landlord now having to incur time and fees to obtain vacant possession. The penalties for failing to use procedures can result in criminal as well as civil liability.

This course also looks at repossession by mortgagees where the Courts expect the parties to have explored all options before the case comes to court. The pre-action protocol sets out rules which the Courts expect to see have been followed. Whatever the reason for possession the procedures can be a trap for litigators as they have their own rules and do not always operate in a similar manner to other Court procedures.

Whilst this course is primarily aimed at those who have little or no knowledge of possession proceedings of residential property, it will serve also as a useful update for those who may deal with these on a more regular basis.

Speaker: **David Smith** is a solicitor specialising in the landlord and tenant team at Anthony Gold Solicitors. He speaks and writes extensively on landlord and tenant and housing matters.

London	17 Apr
Manchester	22 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

## Money Laundering: Building a Compliance Culture

Update | 6 hours CPD

With the prospect of a Fourth Money Laundering Directive being adopted in late 2014 with implementation in the UK expected in late 2015, the AML challenges faced by legal practices show no signs of abating. The SRA's Spring Risk Outlook (2014) highlights money laundering as a serious and increasing risk. Are you confident your employees understand and spot the warning signs or are they complacent? Do your systems/controls mitigate risk? Are they "fit for purpose" or a box ticking exercise? Is compliance a part of everyday business or seen as a business prevention tool? This course explores these issues, covering:

**Fourth Directive** • Timetable • What will it look like? • What next? POCA: a practical perspective • Criminal property: width of the definition • Suspicion: da Silva test • Arrangements: Bowman v Fels still relevant? • Risk factors • Privilege: how do you assess? • Reporting: the practicalities • Tipping off: risks and realities.

**MLR – the challenges** • MLRO: appoint the right person • Risk assessments: your practice, your client • Mitigating risk • CDD challenges • Source of funds • PEPs – what to consider? • Source of wealth • Beneficial owners • Ongoing monitoring • Demonstrating compliance • Communication/training • Monitoring • Horizon scanning.

Speaker: **Alison Matthews** is a leading UK expert on money laundering and chaired the Law Society's Money Laundering Taskforce until August 2012. She has advised on money laundering for 20 years (10 years as the MLRO at a top 20 law firm) and spent 12 years in Professional Ethics (SRA). She was a member of the Government's Money Laundering Advisory Committee and SOCA's SARs Regime Committee. She wrote the *Anti Money Laundering Toolkit* (Law Society, 2012) and the *Data Protection Toolkit* (Law Society, 2014).

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Leeds	21 Apr
Birmingham	28 Apr
London	13 May

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£210 + VAT CLT Members/£450 + VAT Non-members

## Mortgage Fraud Avoidance and Money Laundering Update for Property Lawyers

Intermediate | 3 hours CPD

This course counts as update training as required by the Money Laundering Regulations 2007.

The risks to conveyancers from unwitting involvement in mortgage fraud transactions include liability for lenders' claims and Land Registry losses, professional censure by the SRA under the Code of Conduct, and even criminal proceedings under the Fraud Act 2006 and the Proceeds of Crime Act 2002.

This highly practical course weaves together the various strands of statutory and regulatory risk in property work, and provides insights to the strategies that all firms need to adopt in order to achieve effective risk management in their firms on these issues.

Mortgage fraud is one of format of criminal conduct, and thus one of the forms of money laundering that firms are most likely to encounter. The special considerations for conveyancers in this regard are also covered.

This course therefore counts as update training as required by the Money Laundering Regulations 2007 and will cover:

- Defining the risks faced by property lawyers • Mortgage fraud indicators from the Law Society and the CML • The true scope of identity checking obligations under the MLR 2007 so as also to satisfy the Land Registry and lenders • The reporting regime under POCA 2002 and the Terrorism legislation – how does privilege apply to conveyancers? • Forms and procedures to counter the risks.

Speaker: **Matthew Moore** is the Director of Consultancy Services with Infolegal Ltd – specialist compliance and practice management advisers to the legal profession – and is also a consultant solicitor with the regulatory specialists Jayne Willetts & Co..

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London	14 May pm
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£140 + VAT CLT Members/£300 + VAT Non-members

## An Introduction to Commercial Property Litigation: Part One

**Best  
Seller**

Foundation | 6 hours CPD

This course is aimed at lawyers from a contentious background who are looking to build a practice in commercial property litigation. It will not deal with residential property disputes save in the context of mixed use developments. The course will provide a useful overview of the Landlord and Tenant Act 1954 from which much of the bread and butter work of the commercial property litigator flows, yet contains many traps for the unwary. It will also focus on some of the most common areas in which disputes arise. The course will include:

- The basic concepts of 1954 Act
- Statutory notices under 1954 Act
- Overview of court procedure
- Service charges
- Enforcement of leasehold covenants
- Break options

Speaker: **Mark Shelton** is a professional support lawyer with Eversheds LLP. He qualified with Linklaters and has always specialised in property litigation. Mark was a partner at Lawrence Graham, and has acted for major property investors, financial institutions and leading retailers. He is a contributor to *Estates Gazette* and *Property Law Journal*.

**Manchester** 19 Mar  
**London** 26 Mar

£210 + VAT CLT Members/£450 + VAT Non-members

## An Introduction to Commercial Property Litigation: Part Two **NEW**

**Best  
Seller**

Foundation | 6 hours CPD

This course builds on An Introduction to Commercial Property Litigation – Part One. The course will not deal with residential property disputes.

It considers procedures where the landlord opposes lease renewal on redevelopment grounds. Dilapidations claims, which are increasingly prevalent, are covered in some depth.

The course will include:

- Tactics and requirements for opposing lease renewal on redevelopment grounds
- The interpretation of repairing covenants
- The conduct and settlement of dilapidations claims
- Obtaining landlord's consents
- How tenants can offload over-rented property
- Trespassers
- Avoiding inadvertent waiver of the right to forfeit and a guide through the variety of relief jurisdictions
- A contrast between distress for rent and Commercial Rent Arrears Recovery

Speaker: **Mark Shelton** is a professional support lawyer with Eversheds LLP. He qualified with Linklaters and has always specialised in property litigation. Mark was a partner at Lawrence Graham, and has acted for major property investors, financial institutions and leading retailers. He is a contributor to *Estates Gazette* and *Property Law Journal*.

**Manchester** 23 Apr  
**London** 30 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

## Business Lease Renewal in 2015

Update | 3 hours CPD

The course will focus on negotiating the terms of the new lease, the powers of the court in granting a new lease, and issues of compensation under the LTA 1954 Act and the LTA 1927.

The course will concentrate on the three situations where a transactional property lawyer encounters lease renewal issues:

- Steps to take when acting for a tenant who wants to renew – when to serve Form 26 Notice, the content of the notice and the procedure before and after issue of proceedings
- Steps to be taken when acting for the landlord seeking possession under Ground B persistent delay in paying rent
- Steps to take when acting for the landlord seeking possession under Ground F demolition and reconstruction exploring what should be contained in the Section 25 Notice, excluded works, and the requirement for possession.

Speaker: **Ian Quayle** qualified as a solicitor and worked in private practice for 12 years specialising in property law matters. Since 1998 he has worked as a consultant in all aspects of property, landlord and tenant law.

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London      25 Feb am

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£140 + VAT CLT Members/£300 + VAT Non-members

## Property Contracts: What to do When Things go Wrong

Intermediate | 3 hours CPD

The vast majority of property transactions progress from exchange to completion relatively smoothly, with title passes unhindered from seller to buyer.

However, in today's property market many buyers – whether purchasing freehold or leasehold interests – are looking to withdraw from the property transactions given the fall in property and rental values.

This course looks at the practical steps to be taken when things go wrong, both pre- and post-completion, and will cover:

- Failure to complete
- Bringing the contract to an end
- Misrepresentation
- Errors in the document

Speaker: **Sarah Thompson-Copsey** is a former property litigation partner in the firm now known as Dentons, with a wealth of experience in all aspects of resolving (and avoiding) commercial property disputes. She currently works as a freelance legal trainer & author, and speaks frequently on a wide range of topical, property issues to members of the legal, surveying & property professions throughout the country. She also provides independent legal auditing services to law firms. In addition, Sarah is co-author of two of the leading text books on the Landlord and Tenant Act 1987 & mixed use, site editor for The Property Law website and on the property consultation board for Practical Law.

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London      24 Feb am, 3 Jun am

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£140 + VAT CLT Members/£300 + VAT Non-members



## Boundary Disputes: A Practical Approach

Intermediate | 6 hours CPD

Disputes over boundaries can arise on many transactions, whether a residential purchase or a commercial development. Often the lawyer is asked to advise on the extent of the property on the basis of poor or non-existent plans.

This course will identify the key factors determining the position of a boundary and some practical approaches to solving problems.

Topics covered include:

- Introduction and context: neighbour disputes, commercial disputes, ransom issues
- Sources of information on boundaries
  - HMLR, Ordnance Survey, pre-registration deeds, aerial photos
- Types of dispute
  - Things going onto adjoining land: trees, roots, drains, structures
  - Things interfering with adjoining land: noise, limitations on light
  - Breach of legal rights
- Remedies and limitations
  - Tort: nuisance, trespass, negligence
  - Contractual: enforcement of covenants and restrictions
  - Statutory powers: statutory undertakers powers, local authority powers, Access to Neighbouring Land Act, Party Walls, Land Registry powers
  - Injunction or damages only

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putsman wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

London	27 Apr
Birmingham	28 Apr
Leeds	29 Apr

£210 + VAT CLT Members/£450 + VAT Non-members

## Leases and Tenancy Obligations: Exit Strategies

Intermediate | 3 hours CPD

In today's fast changing property market, it is important that both landlords and tenants are aware of the ways in which they can bring both leases and lease obligations to an end.

Using case studies, this practical course looks at the main areas of law and practice surrounding the ending of leases and its effect on both landlord and tenant covenants.

The course will cover:

- Surrender - Effecting, and avoiding accepting, surrender - The practical steps to take
- Break clauses - Reviewing the impact of recent cases on defects in the exercise of break rights - The tricky problem of 'material compliance' - The impact of landlords' break notices
- Forfeiture - Why it might be worth it, even in a falling market - Practical tips to ensure effective operation of the right to forfeit - The problem of tenant insolvency
- Business tenancies - Steps the tenant can take - Section 27 notices or simple vacation? - Practical tips for landlords - Ending the lease after proceedings have started
- Disclaimer - The tricky problem of sub-tenants' obligations
- Notices to quit - How to use them and when
- The release of landlords' and tenants' obligations since the 1995 Act - A review of recent cases

Speaker: **Sarah Thompson-Copsey** (see page 9).

London	24 Feb pm, 3 Jun pm
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£140 + VAT CLT Members/£300 + VAT Non-members

# Rent Collection and Payment - The Hidden Issues

Intermediate | 3 hours CPD

Payment of rent is not only the key aspect of the landlord and tenant relationship, it's the very foundation of it. But how well is the nature of rent understood? Anyone can send out a rent demand, anyone can make a rent payment, but not everyone is aware of the potential to lose valuable rights and remedies, or even to incur penalties, if actions are taken without the relevant knowledge. In this course, we consider rent collection and payment from the position of both landlord and tenant, dealing with the wider consequences for other lease rights and obligations, the management of the landlord and tenant relationship, and prevention of problems before they occur.

- Assessing different types of tenant and landlord
- When rent is due
- When to pay
- Risks of late payment
- Apportionment
- The rules of appropriation
- Waiver of the right to forfeit
- CRAR and other remedies
- Implications of payment by third parties
- Payment and acceptance in holding-over situations.

The course is focused on commercial property, while also considering specific issues in relation to mixed-use properties with a residential element. It is aimed at all property litigators and commercial property lawyers.

Speaker: **Mark Shelton** is a professional support lawyer with Eversheds LLP. He qualified with Linklaters and has always specialised in property litigation. Mark was a partner at Lawrence Graham, and has acted for major property investors, financial institutions and leading retailers. He is a contributor to Estates Gazette and Property Law Journal.

Birmingham  
London

15 May pm  
22 May pm

£140 + VAT CLT Members/£300 + VAT Non-members

# Environmental Warranties and Indemnities in Corporate and Property Transactions

Advanced | 6 hours CPD

Drinks manufacturer, Red Bull, was fined £270,000 for breach of environmental laws they knew nothing about. In many cases the cost of site clean-up could exceed the value of the deal!!

This case study based course takes you from heads of terms to drafting, negotiating and settling the relevant provisions. The outcome is a set of clauses that can be taken back to the office and incorporated into the firm's precedent bank.

Many of the environmental provisions contained in business or property sale agreements focus too narrowly on the statutory 'Part 2A' regime for contaminated land. Negotiations also tend to confuse the various methods for allocating responsibility between the parties (eg agreement on liabilities, payment for remediation) and often clauses are included that do not meet the parties intentions.

This course is essential for all commercial property practitioners whether they act on standalone property transactions or are called to give property support on corporate deals.

Speaker: **Malcolm Dowden** is a consultant to City law firm Charles Russell LLP and director of Gwentian Consulting Limited. He has extensive experience of designing and delivering CPD accredited training for law firms and corporate clients. He frequently contributes to journals, including the Estates Gazette and New Law Journal.

London

21 May

£210 + VAT CLT Members/£450 + VAT Non-members

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# Certificate in Planning

**Best  
Seller**

Foundation | 12 hours CPD

This two day course introduces delegates to the essential aspects of planning law and focuses on those areas which are particularly pertinent to commercial property and planning lawyers. It is aimed at those who have no (or very little) knowledge of the topic but are joining the planning group within a Firm or are commercial property lawyers called upon to advise on planning issues as part of commercial property transactions. It is also ideal for those who have some experience in the field and need an update following significant changes to the planning regime in the past few years.

Learning is reinforced by case studies and discussion

## Day 1

- Why do we have planning? Origins of the modern system and the Town and Country Planning Act 1947
- The current legal framework – the Town and Country Planning Act 1990, Planning Act 2008, Localism Act 2011, Growth and Infrastructure Act 2013
- Why do we need planning permission? Exceptions to the need for planning permission
- Outline permission and full permission
- Permitted development rights, general, special and local development orders, enterprise zones and simplified planning zones
- Applying for planning permission and the criteria for the decision
- What is the development plan? How is it created? The role of the public
- What are “material considerations” and what is the role of Government policy?
- Supporting documents and processes: design and access statements
- Environmental impact assessment
- Decision periods, rights of appeal and Judicial Review
- High Court and Secretary of State respective supervisory roles

## Day 2

- Conditions
- Section 106 agreements
- Community Infrastructure Levy

- The duration of planning permission
- Enforcement of planning control
- Time limits for enforcement, and concealed breaches
- Listed Building Control
- What is a listed building?
- What does a listing look like?
- Conservation area control
- How is it different in the Green Belt, Areas of Outstanding Natural Beauty and World Heritage Sites
- Nationally Significant Infrastructure Projects: the process under the Planning Act 2008
- Granting planning permission by a Hybrid Bill - Crossrail, HS2 and CTRL
- The National Planning Policy Framework
- What next? A preview of possible reforms

Speaker: **David Brock** is an author, lecturer, and retired planning solicitor. He worked for over 30 years in planning law on major projects such as Canary Wharf, Kings Cross, Whatley Quarry, Cambourne New Settlement, Channel Tunnel Rail Link, East Kettering Sustainable Urban Extension and the Rookery South energy from waste project. He is a former partner of both Herbert Smith (now Herbert Smith Freehills) and Mills & Reeve. David is the immediate Past Chair of the Law Society's Planning and Environmental Law Committee and has written extensively on the need to reform and simplify planning. He now heads Brock Consulting, where he writes, speaks and chairs conferences on a range of subjects from modern art to law.

<b>London</b>	<b>11 - 12 May</b>
<b>Manchester</b>	<b>21 - 22 May</b>

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## SDLT Walkthrough and Workshop for Residential and Commercial Conveyancers **NEW**

Foundation | 3 hours CPD

Instead of the traditional presentation this highly practical course will go through the processes of completing SDLT returns online, with demonstrations, including:

- Draft letters to clients at the outset setting out the limitation of your responsibilities and the nature of self assessment with the risks of further tax being imposed
- Questionnaires for clients so you can complete the returns without error
- Flowcharts and decision processes
- Checklists to help you avoid errors
- Draft explanations of key concepts to clients such as linked transactions and connected people, consideration, self-assessment and further tax payment obligations, substantial performance, penalties, overage, deferred consideration, tax savings scheme risks and other issues
- What the common problems are with each tax return and conveyancing situation

Delegates will be encouraged to interact and solve example problem situations involving some of the above issues.

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putman wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

London 12 May am

£140 + VAT CLT Members/£300 + VAT Non-members

## SDLT and Commercial Transactions (including Commercial Leases) **NEW**

**Hot Topic**

Advanced | 3 hours CPD

Building on the principles in the morning course we will look at the following areas in the same interactive walk-through manner.

- Linked transactions and connected parties as regards company and commercial property transactions
- Consideration affecting fixtures, goodwill
- Substantial performance and development agreements
- Conditional contracts and options
- Disclosures to HMRC – tricky decision for the client – with suggested draft explanatory notes for clients
- Commercial leases, agreements for lease, substantial performance, premiums, rent deposits, assignments taking effect as grants, renewal of commercial leases, surrenders and regrants, periodic leases, holding over, etc
- Sub sales – the new rules
- Deferred and contingent or uncertain consideration

Delegates will be encouraged to interact and solve example problem situations involving some of the above issues.

Speaker: **Hannah Mackinlay** is a director of Mackinlay Projects Ltd, a solicitor and formerly a partner at Shoosmiths and Putman wlc and an associate at Pinsents specialising in property development, development finance and environmental law.

London 12 May pm

£140 + VAT CLT Members/£300 + VAT Non-members

## Getting to Grips with VAT and Property

Intermediate | 6 hours CPD

This course is designed for property practitioners seeking a greater understanding of VAT and its application to property. This is a notoriously difficult area where clear guidance is needed.

The speaker is an expert in this field. Part of his individual consultancy practice deals with giving advice to property owners, accountants and solicitors on a very regular basis.

This course will cover:

- Application to residential property
- Assignments, surrenders and reverse surrenders
- Options to tax, grants not effected by option and recent developments
- Mixed developments
- Standard enquiries and contracts
- Transfers of going concerns

Speaker: **Andrew Walls** has twenty years' experience in VAT, formerly with Customs and Excise as a visiting officer and in private accountancy practice with major firms. He is now the Principal Consultant in Hiland Consulting specialising in advice to practice and in training.

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London      16 Jun

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£210 + VAT CLT Members/£450 + VAT Non-members

## New Capital Allowances Regime: Another **Best Source of PI Claims for Property Lawyers Seller**

Update | 3 hours CPD

The Capital Allowance regime has always been challenging!

From April 2014, capital allowances are only available to someone buying second-hand commercial property if the past owner 'pooled' qualifying expenditure for capital allowances, i.e. notified it to HMRC in a tax return. The new legislation requires a proactive approach by lawyers before exchange as failure to deal with this prior to exchange may mean the owner loses considerable tax relief or suffers a reduction in property value. Retrospective action is not always an option.

This half day course provides an overview and includes:

- Basic principles - why, what, who?
- Impact on property acquisitions, construction and refurbishment costs, capital contributions to tenants
- Value of tax relief - case studies and worked examples
- What happens to the claim and HMRC
- Transition periods
- Legislation change and the impact on lawyers
- Practical implications – 'pooling Requirement', 'Fixed Value Requirement' and 'Disposal Value Statement'
- CPSEs!!

No commercial property practitioner can afford to miss it!

Speaker: **Rachel Sanders** is Director, Head of Financial & Economic Consulting at AECOM. She is passionate about Capital Allowances and Asset Depreciation acting for a wide range of clients investing in property. She is a Chartered Surveyor.

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London      12 Feb pm, 4 Jun pm

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Future dates available online

### Agricultural Land - The Key Elements

Conveyancing solicitors are sometimes faced with having to deal with the acquisition of a small area of agricultural land perhaps for use as garden land, or a paddock or for grazing. This webinar is designed to assist the conveyancer who has to deal with these occasional transactions.

Speaker: **Lorraine Richardson**, MA(Cantab), Solicitor, specialising in residential conveyancing in a practice in Suffolk. Lorraine has a wealth of experience, and is also a co-editor of the popular and practical Law Society publication "Conveyancing Forms and Procedures".

20 Apr | 10.00am - 11.00am

### ATED (Annual Tax on Enveloped Dwellings)

The new tax known as ATED (originally called Annual Residential Property Tax) was introduced in the Finance Act 2013. The first chargeable period runs from 1 April 2013. Do you understand how this new tax works and how you should advise your clients? Do you know the difference between reliefs and exemptions? This webinar will clarify the mysteries of ATED (with practical examples and no tax jargon).

Speaker: **Peta Dollar** *see page 9*.

11 Mar | 4.00pm - 5.30pm

### Commercial Property Contracts: What Should the Contract Provide? (Part 1)

Any contract for the sale of land has to be fit for purpose. Every property and client is totally different so the contract should reflect this. As well as covering the relevant Standard Commercial Property Conditions, this webinar will highlight the key questions to ask your clients when drafting and negotiating contracts.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

5 Jun | 10.00am - 11.30am

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## Commercial Property Contracts: What Should the Contract Provide? (Part 2)

Any contract for the sale of land has to be fit for purpose. Every property and client is totally different so the contract should reflect this. As well as covering the relevant Standard Commercial Conditions, this webinar will cover the updated Code for Completion and importantly will highlight the key questions to ask your clients when drafting and negotiating contracts.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

**26 Jun | 10.00am - 11.30am**

## Completion Procedures - How Well do you Know Them?

The failings of the firm in *Santander v RA Legal* [2014] were the main reason that they were found liable for breach of trust when they paid away mortgage funds to a fraudster. Briggs LJ referred to the 'lamentable state of muddle' on the part of the firm.

Speaker: **Lorraine Richardson**, MA(Cantab), Solicitor, specialising in residential conveyancing in a practice in Suffolk. Lorraine has a wealth of experience, and is also a co-editor of the popular and practical Law Society publication "Conveyancing Forms and Procedures".

**16 Mar | 4.00pm - 5.30pm**

## Conflicts and Confidentiality - What Conveyancers Must Know

The Solicitor's Code of Conduct has been with us since October 2011 but when faced with the question of whether to act for the seller and the buyer in the same transaction, many firms still apply the exceptions contained in the 2007 Code, considering whether the clients are established and are being represented by fee earners at separate offices.

Speaker: **Lorraine Richardson**, MA(Cantab), Solicitor, specialising in residential conveyancing in a practice in Suffolk. Lorraine has a wealth of experience, and is also a co-editor of the popular and practical Law Society publication "Conveyancing Forms and Procedures".

**1 May | 1.00pm - 2.30pm**

## Contracting-Out of the Landlord and Tenant Act 1954 - Deceptively Simple?

This webinar is essential viewing for all property litigators and commercial property lawyers.

In 2003 reforms to the 1954 Act did away with any court involvement in the contracting-out process. The notice and declaration procedure which was introduced looked to be much simpler and quicker but as the implications sank in, a number of hidden difficulties began to appear. Contracting-out may underpin the property valuation, or affect practical plans for the property. You need to understand the technicalities, whether structuring more complex transactions or dealing with everyday stuff!

Speaker: **Mark Shelton** (see page 42)

**12 Feb | 1.00pm - 2.30pm**

## Covenants for Title - What are They and do They Matter?

Many conveyancers will complete the contract on a sale and will insert 'full title guarantee' with little understanding as to why they are doing this and what the wording means. The covenants for title were introduced by the Law of Property (Miscellaneous Provisions) Act 1995 and many practitioners at the time wondered what the fuss was about and why the previous regime needed to be changed at all.

Speaker: **Lorraine Richardson**, MA(Cantab), Solicitor, specialising in residential conveyancing in a practice in Suffolk. Lorraine has a wealth of experience, and is also a co-editor of the popular and practical Law Society publication "Conveyancing Forms and Procedures".

**1 May | 10.00am - 11.30am**

## Death Between Exchange and Completion - A Potential Nightmare

This is a rare but potentially nightmare scenario in any conveyancing transaction. Whether the matter can proceed will depend on whether it is the seller or the buyer who has died and whether one or two parties are involved. This webinar will act as a useful review for the more junior practitioner and a refresher for the more experienced conveyancer in this area.

Speaker: **Lorraine Richardson**, MA(Cantab), Solicitor, specialising in residential conveyancing in a practice in Suffolk. Lorraine has a wealth of experience, and is also a co-editor of the popular and practical Law Society publication "Conveyancing Forms and Procedures".

**23 Mar | 4.00pm - 5.30pm**

### Doing s106 Agreements in Today's Market

The need for section 106 agreements was supposed to diminish with the introduction of CIL, but they are still an essential and common feature of planning. Case law has unearthed many traps for the unwary, the CIL regulations introduced new hurdles, and local planning authorities can renegotiate s.106s with affordable housing requirements. This webinar will provide guidance on the above as well as reviewing the current edition of the Law Society's Model s 106 Agreement. It is aimed at all commercial property and planning lawyers who may need to advise on or negotiate s106 Agreements.

Speaker: **David Brock** (see page 44)

19 Jan | 1.00pm - 2.30pm

### Early Occupation - Is it too risky?

Landlord clients are often eager to let tenants take up occupation before their lease has formally completed, keen to receive their rent as soon as possible. But what is the safest way to proceed? This webinar will highlight the practical implications of early access and consider the various approaches that may be taken, highlighting the pros and cons of each, including licences, tenancies at will and agreements for lease

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

30 Jan | 10.00am - 11.30am

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### Essential AGA's Update - Where Are We Now?

Commercial property practitioners, acting for landlords or tenants, must understand all of the key issues surrounding authorised guarantee agreements ("AGAs"). Over the past few years we have seen various decisions relating to AGAs but what needs to be done to reflect these in practice?

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

29 Jan | 10.00am - 11.30am

### Insolvency and Leases (1)

The continuing economic downturn means that tenant insolvency remains a very real concern for landlords in today's commercial property market. It may well have a very substantial impact on a landlord's ability to recover rents and rates, to bring the lease to an end and even to recover arrears from sureties or former tenants.

This first of two sessions on insolvency & leases will examine the restrictions imposed on the landlord's remedies where the tenant enters into administration, and the practical steps to be taken.

Speaker: **Sarah Thompson-Copsey** (see page 9).

5 Mar | 10.00am - 11.30am

### Insolvency and Leases (2)

Recent voluntary arrangements and compulsory insolvencies have had a major impact on a landlord's ability to enforce the terms of the tenant's covenants in a lease, and in particular to keep the rental stream running.

This second of two sessions on insolvency & leases will examine the difficulties faced by landlords in ensuring compliance with the tenant's covenants under the lease imposed by both voluntary arrangement and liquidation.

Speaker: **Sarah Thompson-Copsey** (see page 9).

23 Apr | 10.00am - 11.30am

### Negotiating Alienation Clauses - In An Hour

The aim of this webinar is to run through the key alienation provisions of a commercial lease in today's market. What do you need to watch out for when acting for tenants and what should you include when acting for landlords? The current issues arising in practice will all be covered with suggested compromises where appropriate.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

17 Apr | 1.00pm - 2.30pm

### Negotiating Alteration and Repairs Clauses - In An Hour

The aim of this webinar is to run through the key alterations and repairs provisions of a commercial lease in today's market. What do you need to watch out for when acting for tenants and what should you include when acting for landlords? The current issues arising in practice will all be covered with suggested compromises where appropriate.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

15 May | 10.00am - 11.30am

### Negotiating Insurance Clauses - In An Hour

The aim of this webinar is to run through the key insurance provisions of a commercial lease in today's market. What do you need to watch out for when acting for tenants and what should you include when acting for landlords? The current issues arising in practice will all be covered with suggested compromises where appropriate.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

13 Feb | 1.00pm - 2.30pm

### Negotiating Rent Review Provisions - In An Hour

The aim of this webinar is to run through the key rent review provisions of a commercial lease in today's market. What do you need to watch out for when acting for tenants and what should you include when acting for landlords? The current issues arising in practice will all be covered with suggested compromises where appropriate.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

17 Apr | 10.00am - 11.30am

### Negotiating Service Charge Clauses - In An Hour

The aim of this webinar is to run through the key service charge provisions of a commercial lease in today's market as well as the RICS Service Charge Code. What do you need to watch out for when acting for tenants and what should you include when acting for landlords? The current issues arising in practice will all be covered with suggested compromises where appropriate.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

13 Feb | 10.00am - 11.30am



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Many conveyancing firms streamline their processes and different teams handle different elements of the transaction. In many cases, the post completion work is handled by a member of the administration or support team rather than the fee earner. Is this a good idea?

Speaker: **Lorraine Richardson**, MA(Cantab), Solicitor, specialising in residential conveyancing in a practice in Suffolk. Lorraine has a wealth of experience, and is also a co-editor of the popular and practical Law Society publication "Conveyancing Forms and Procedures".

20 Apr | 1.00pm - 2.30pm

## Rent Deposits - Negotiating and Drafting Issues

Rent Deposits are fundamental in strengthening what otherwise might be a weak tenant covenant. Whether acting for landlord or tenant, it essential to know the ways in which rent deposit deeds can be structured, what they should contain and how they should be dealt with.

Speaker: **Natasha Dunn** is an associate professor of real estate in the professional development division at the University of Law. She qualified in the City and then spent many years in practice specialising in commercial real estate.

27 Feb | 10.00am - 11.30am



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